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ABSTRACT

This manual is designed to guide school personnel in installing a basic filing system in their schools. It provides both a filing system outline that can be patterned to any school and instructions for selecting materials and making the installation. Some of the topics covered include planning the installation, adapting the system, determining materials needed, installing the system, and extending the system to other files in the school. (Author/LD)

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A Basic School Filing System

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FOREWORD

Several years ago an instruction manual for installing a suggested school filing system was made available to the schools. Since that time, copies of the manual have been distributed and many meetings have been held with school administrators, secretaries, and business personnel at which the techniques of installing and operating the filing system have been discussed.

The basic school filing system presented in this manual was developed in answer to the demands of school administrators for an effective method of controlling their records. It is termed "basic" because it was designed to handle the records that are basic to all school districts. It is recognized that an effective filing system is paramount to the control of records, but it also incorporates other features designed to promote the satisfactory management of school records.

Contents of files do not remain static. Activities in a school district are constantly changing, and the files will reflect these changes. Because of several new and enlarged areas of activity since the 1964 edition of the manual, it seems an appropriate time to revise the subject-matter classification.

This manual is designed to guide school personnel in installing the filing system in their own schools. It provides a filing system outline that can be patterned to any school and instructions for selecting materials and making the installation.

In addition, this manual should be of assistance to personnel in the hundreds of schools that have installed the basic school filing system and wish to update their present files.

The basic school filing system, as here presented, was developed by Kenneth L. Brock of this office. To those in the schools, in State departments, and in private organizations who contributed ideas and experiences, a deep appreciation is here expressed.

Louis L. Tucker
Assistant Commissioner for State History

A Note to Elementary Schools

The outline of the basic school filing system presented on pages 31 to 72 of this manual may contain primary and secondary subject categories as well as folder captions that do not apply to an elementary school.

This does not mean that the basic school filing system will not fit an elementary school. It means simply that those who are installing the filing system in an elementary school may have to discard a great amount of the outline in patterning it to fit the needs of their school. The patterning can be done only by those who are familiar with the records and the administrative procedures of the school.

Data covering cost, installation time, and the quantities of required materials that are given in this manual will have less meaning for most elementary school offices than for other school offices. Determination of the quantities of materials needed for an installation should be made only after the filing system outline has been patterned to the elementary school.

Except for the above, the installation and the operation of the basic school filing system will be the same for an elementary school as for any other school.

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Terminology

Basic School Filing System Outline - An outline, indicated in detail in Outline of Basic Filing System pages 31 to 72 of this manual, showing the arrangement of sections, guide cards, folders, and half-folders in the file. This is referred to in the text as the filing system outline.

Central Files - The main files in a school system which are usually found in the office of or are directly under the control of the school administrator.

Cross-Reference Sheet - A sheet of paper inserted in a folder to show the location of records in other folders. Their most common use is in filing correspondence covering two or more subjects.

Decentralized Files - Files that have been separated from the central files or established independently of the central files and which are operated for administrative or other reasons as separate files.

Locator Card - A device inserted in the central files to show the location of records that are filed outside the central files.

Materials - The guide cards, folders, and half-folders (either regular or suspension type), and labels used in installing the basic school filing system.

Permanent Cross-Reference Card - A device inserted permanently in the central files to show the location of records filed elsewhere in the central files and used to reduce the amount of cross-referencing usually needed in a subject-matter file.

Records - Term "records" has many meanings, but for this purpose records include all the orders, forms, reports, working-papers, and correspondence (either in paper, card, or book form) which are created, received, or used by a school.

Subject-Matter Classification - The arrangement of records by their subjects for filing and finding purposes.

THE SCHOOL FILING SYSTEM

"That record is here somewhere, but we can't find it," are words heard too often in schools today. At best a lost record may prove only a temporary embarrassment to the school's administrative personnel; at worst it may result in a severe personal or financial loss. In any event, lost records are evidence of inadequate records control.

Records are vital to a school system, for they show every aspect of its operation, reflect its growth, mark its strong points or its shortcomings, and reveal the achievements of its pupils. No school system can function long without records. Nor can it function satisfactorily without effective records control.

The key to the control of school records is the school filing system. Where the filing system has ceased to operate effectively, the management of school records is usually a major problem that is apparent in lost or misplaced records, overtaxed filing drawers, and the excessive amount of personnel time spent in filing and finding records.

An effective school filing system must provide for expansion to keep up with the growth of the school system, facilitate the internal operation of filing and finding, establish control over decentralized files, and provide for the filing of active records and the storing of inactive records.

School administrators can afford only an effective filing system because of the steady accumulation of records, the increase in administrative costs, and the frequent turnover in office personnel.

WHAT THE BASIC FILING SYSTEM WILL PROVIDE

The basic school filing system is designed to solve records filing problems by providing:

1. A subject-matter classification of school records with four sections that can be followed in organizing a filing system. The sections -- administration; instruction; equipment and plant operation and maintenance; and pupils -- are basic to all schools and are broad enough to cover present activities. Each section can be expanded internally to keep pace with the growth of the school, and, if future developments require, additional sections can be added. The classification pattern can be adapted readily to fit the needs of any size school.

2. An easily workable filing system that can be operated effectively in a relatively short time by school personnel. The arrangement within the filing system, the extensive breakdown of the subject-matter classification, and the use of permanent cross references and finding aids make speedy work of the filing and finding operation.

3. A method of establishing control over all the records of the school district. By the use of locator cards inserted in the central files, it is possible to identify and indicate the location of all records filed or stored outside the central files.

4. A retirement or transfer file for records that are no longer active but yet must be retained.

SUBJECT-MATTER CLASSIFICATION AND FILING

Classification is a plan for filing records. The subject-matter classification used in the basic filing system divides records into four broad areas or sections. Within a section, records are grouped by subject into alphabetically arranged categories termed primary subjects. When necessary, primary subjects are further divided into secondary subjects. Therefore, the subject-matter classification set forth in this manual is a pattern for bringing together related records as determined by the subject content of those records.

Filing is the systematic placing of records in the files according to the established classification plan so that at a later date the records may be found again. Filing by subject-matter -- by what the record is about -- is used in the basic filing system. For example, all records relating to insurance including insurance appraisals, registers, policies, and accident reports of both employees and pupils are classified as insurance records and are filed as part of the primary subject "Insurance." Likewise, correspondence is classified and filed by its subject rather than by the date received, by whom written, or to whom addressed. Thus a letter relating to plumbing repairs would be filed in the Equipment and Plant Operation and Maintenance section in the folder captioned "Building Repairs -- Plumbing." The filing of a letter covering more than one subject will be discussed later. (See page 24.)

ADVANTAGES OF SUBJECT-MATTER CLASSIFICATION

Classification of records by subject-matter was chosen because it has proved in industry and government to be the easiest way to identify and to arrange a large variety of record types. By using subject-matter classification, the diverse types of records found in any school such as correspondence, budgets, reports, etc., may be filed in one filing system, eliminating the need of setting up separate files for "correspondence," "state reports," "purchasing," and the like.

Subject-matter classification has the distinct advantage of keeping related records together and not scattering them throughout the files as commonly happens with files arranged on an alphabetic classification.

Subject-matter classification has the further advantage of being easily expanded or modified to meet the specific needs of each office. Subject categories can be expanded or contracted. Whole sections can be removed without affecting the remainder. Such flexibility is seldom possible with files arranged by alphabetic or numeric classification.

PLANNING THE INSTALLATION OF THE BASIC FILING SYSTEM

In planning the installation of the basic filing system it is necessary to decide who should make the installation, when it should be done, how much time will be required, what it will cost, and what procedure should be followed.

WHO SHOULD MAKE THE INSTALLATION

Most of the work of installing the filing system should be done by those who will use the files. By so doing, a thorough knowledge of the filing system will be acquired during the process of installation. Labels can be typed by any proficient typist. The school administrator, however, must be prepared to make decisions which cannot be made by the office personnel.

WHEN TO MAKE THE INSTALLATION

The installation can best be made during a vacation period when there is less demand for records and when office personnel are free to devote more of their time to special projects. If a vacation time is not a satisfactory time to do the work, the installation, as has been demonstrated in many of the test installations, can be made during the school session. In such cases, interruptions are to be expected, and personnel installing the filing system must adjust their installation schedule accordingly.

TIME REQUIRED

The time required for installing the basic filing system will depend upon the volume of the school's records, the number of persons that can work on the installation, and the hours a day that each can work. Experience has shown that where folders did not require extensive screening and resorting, installations can be made in approximately two weeks by three persons working full time after they have familiarized themselves with the basic filing system outline (see page 31).

In some cases, it will be necessary for office personnel to install the filing system on a part-time basis, sandwiching the work in between other tasks. Under such conditions the time required to make the installation will naturally be increased. This is not necessarily a drawback since with a reasonable amount of care the new filing system and the old can be operated side by side as a dual filing system until the installation is completed.

WHAT IT WILL COST

The cost of installing the basic filing system will vary according to the volume of the records, the size (letter or legal) of the filing drawers, and the type and quality of the materials used. The cost of the materials, using regular type folders, has been reasonably inexpensive for recent installations (exclusive of the cost of filing cabinets when new ones are purchased). The use of suspension type folders increases the cost substantially.

In some cases it may be possible to re-use some of the folders and guide cards from existing files, but this will not be an economy if the materials are not in first-class condition or if excessive time is required to salvage them. However, if the present files are equipped with the more expensive suspension type folders, an economy can be effected by re-using as many of them as possible.

The time spent making the installation and not the cost of materials is the most expensive part of the installation. Inferior materials that will need to be replaced within a year or two or materials that are difficult to work with are uneconomical.

WHAT PROCEDURE SHOULD BE FOLLOWED

A procedure has been established for installing the basic filing system in the least amount of time with the best possible results. Those who are to make the installation should first familiarize themselves in a general way with the entire procedure. Then they should become thoroughly familiar with each step before undertaking it.

Local requirements or working conditions may necessitate alteration of the procedure during the installation, but no step should be omitted.

The steps in the procedure, together with their designated location in this manual, are as follows:

Adapting the Filing System.....Page 5

Determining the Materials Needed.....Page 7

Preparing Guide Cards, Labels, and Folders.....Page 18

Installing the Filing System.....Page 21

Inserting Locator Cards, Permanent Cross-Reference Cards, and Finding Aids.....Page 23

Setting Up the Transfer or Retirement Files.....Page 26

Extending the Basic School Filing System to Other Files in the School System.....Page 27

ADAPTING THE FILING SYSTEM

Despite the similarity of records in schools that makes possible the basic filing system, there are differences in school systems that are reflected in the records. For this reason, the basic filing system must be adapted to fit the particular needs of each school system.

Adapting the filing system to the records in the school is the first step in the installation. It is not difficult, but it must be done by someone familiar with the school's administrative procedure and records. It can best be done jointly by the school administrator and the person or persons in charge of the files.

Adaptation involves three steps: adapting the filing system outline to the central files; providing a locator system for records outside the central files; and determining the records in the central files that should be assigned permanent cross-references.

ADAPTING THE FILING SYSTEM TO THE CENTRAL FILES

The filing system outline is a composite of the types of records found in several school systems. It is intended to be used as a guide or framework for the arrangement of records. Therefore, it is necessary first to adapt the outline to the specific needs of your office. This is best accomplished as follows:

1. Familiarize yourself with the arrangement and contents of the basic filing system outline.

2. Then, with the outline at hand, inventory your records to determine:

   a. Primary and secondary subject categories and folder captions in the outline, which fit your records "as is";

   b. Primary and secondary subject categories and folder captions in the outline which must be modified to fit your needs;

   c. Primary and secondary subject categories and folder captions in the outline which must be deleted; and

   d. Primary and secondary subject categories and folder captions which must be added to the outline to provide for your records. Additions to the outline are made in the appropriate section in alphabetical order.

An example of adapting the filing system outline appears below. As can be seen, the filing system outline has been adapted to local requirements by deleting items that are not appropriate, making certain folder captions more specific and adding folder captions based on records found in the office.

INSURANCE_____

INSURANCE -- GENERAL

INSURANCE -- ACCIDENT REPORTS - EMPLOYEES

INSURANCE -- ACCIDENT REPORTS - PUPILS
INSURANCE -- BOILER INSPECTIONS
INSURANCE -- CLAIMS - 1971-72

Adding primary and secondary subject categories and folder captions to the outline to provide for additional records can best be done as follows:

1. Determine the subject of each additional record;

2. Determine in what section (Administration; Instruction; Equipment and Plant Operation and Maintenance; or Pupils) of the filing system the record should be filed; and

3. Prepare guide card and folder labels as necessary, following the instructions given under "Preparing Guide Cards, Labels, and Folders."

For example, records are found pertaining to a recreation program and there is no provision for them in the outline. Following the steps given above, first determine the subject which, in this example, is "Recreation." Determine where (in what section) "Recreation" belongs. In this case recreation includes the operation of a summer recreational program by the school district. Therefore, "Recreation" will be a primary subject category of the Administration section. (Primary subject categories are indicated by first position guide cards.) This guide card is then added to the outline in alphabetic sequence within the Administration section.

In every case where it is necessary to add primary and secondary subject categories and folder captions to the outline it is obvious that no hard and fast rule can be given to indicate exactly what guide cards and folder captions must be prepared. To show the reasoning to be applied, however, return to the example of "Recreation" that has been added to the outline as a first position guide card.

Assume that the records relate to various phases of the recreational program including operation of a swimming pool, a playing field, and certain school playgrounds. Besides records relating to these specific aspects of the program, there are reports and an assortment of papers in general pertaining to the subject.

The next step is to determine suitable identifying captions for these records, such as:

RECREATION -- GENERAL
RECREATION -- PINE RIDGE PLAYING FIELD
RECREATION -- PLAYGROUNDS
RECREATION -- REPORTS
RECREATION -- SWIMMING POOL

PROVIDING A LOCATOR SYSTEM FOR RECORDS OUTSIDE THE CENTRAL FILES

In every school system some records are kept outside the central files. Records such as maps, minute books, attendance registers, account ledgers, building plans, and many others cannot be kept in central files because of their bulk, use, or value. These records are usually maintained in storage rooms, other offices, or safes and vaults. When a record cannot be centralized, show its location by inserting at the appropriate position in the files a locator card that identifies the record type and indicates its location.

In the filing system outline records that are often located outside the central files are indicated by (L) typed at the beginning of the caption. These are merely suggestions. Personnel installing the filing system must determine for themselves what records are located outside the central files and, therefore, require locator cards.

This determination can be made most easily and quickly by inventorying the records that are not in the files. Such an inventory need not be complicated, but it should identify each record type, give the inclusive (beginning and ending) dates, and indicate the location or locations of the record. While the location of records will vary with each school system, some places that should be included in any records inventory are the business manager's office, clerk's office, treasurer's office, supervisor's office, nurse's office, guidance counselor's office, safe, vault, and records storage area.

DETERMINING THE RECORDS THAT NEED PERMANENT CROSS-REFERENCES

In almost every filing system based upon a subject-matter classification there is some overlapping of subjects. While this has been reduced to a minimum in the basic filing system by the extensive subdividing of the classifications, some overlapping still remains. To take care of this, permanent cross-references are inserted to show the filing locations of these records within the central files.

A permanent cross-reference card, similar in appearance to a locator card, is used. Cross-reference cards are indicated in the outline by an (X) before the caption. If additional permanent cross-reference cards are needed in the files, indicate in the outline the places where they should be inserted.

DETERMINING THE MATERIALS NEEDED

In most cases existing filing cabinets can be used for the installation of the basic filing system. If new cabinets are required, it will be necessary to determine whether letter or legal size cabinets are to be purchased before materials are ordered for the basic filing system. Both size cabinets are widely used in schools so the choice will be one largely

of individual preference. Once the size of the filing cabinet has been determined, only that size should be used because the use of both letter and legal size filing cabinets in the same installation will increase the cost of the materials and will reduce the flexibility of the system.

There are two kinds of filing materials. The one most commonly used is the regular folder that rests upon the bottom of the filing drawer and is held upright by guide cards, other folders, and the followup block within the drawer. The other is the suspension type folder suspended by hanger rods from a metal rack or framework set in the filing drawer. Materials for each installation will be discussed separately under the headings "Regular Folder Installation" and "Suspension Folder Installation."

REGULAR FOLDER INSTALLATION

The materials required in a regular folder installation are guide cards, folders, half-folders, and labels. The guide cards, folders, and half-folders will be either letter size or legal size depending upon the size of the filing drawers used.

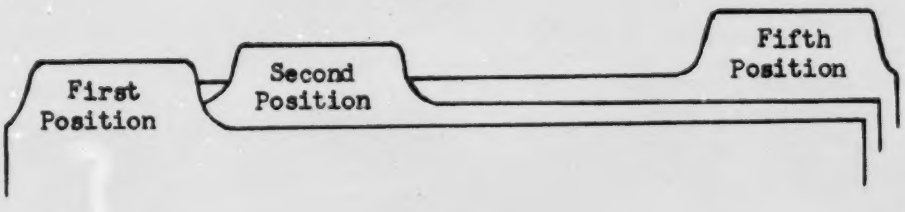
GUIDE CARDS

Guide cards made of 25-point pressboard with positioned flat metal tabs for the insertion of guide labels are recommended. Guide cards with a reinforced lug on the bottom edge are used in filing drawers that contain drawer rods.

Guide cards, in addition to supporting folders so that they will remain upright in the drawer, are useful for filing and finding records. In the basic filing system they show primary and secondary subject categories and serve as an aid in finding frequently used records. Each function is governed by the position of the metal tab on the guide card, as follows:

Primary subject category	First position tab
Secondary subject category	Second position tab
Finding aid	Fifth position tab

The guide cards appear in the file in the following manner:



The number of first and second position guide cards that will be needed can be determined by counting the primary and secondary subject category headings listed in the filing system outline after the outline has been adapted to the filing requirements of the particular office.

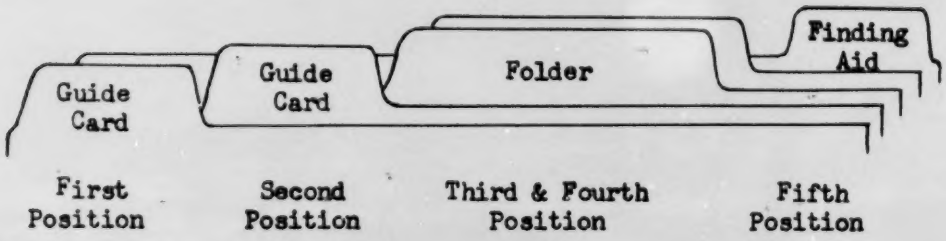
The number of fifth position guide cards needed will vary with the number of finding aids installed in the filing system. The two types of finding aids used in the basic filing system are discussed in detail in the section entitled "Inserting Locator Cards, Permanent Cross-Reference Cards and Finding Aids," pages 23 to 25. The number of finding aids can be determined fairly accurately from the outline.

In ordering guide cards, it is advisable to order a few extra of each of the three tab positions to provide for individual adjustments within the filing system and for future expansion.

FOLDERS

Folders made of heavy kraft paper are recommended. They should have a reinforced top edge to give added strength at points of greatest wear and should be triple scored (lightly creased) parallel to the fold to permit expansion of the folder to approximately one-half inch in thickness.

The folder tab (the projection at the top used for labeling) should be about twice the width of a guide card tab and in a position immediately to the right of the secondary subject category (second position) guide card tab. This type folder is described as having a two-fifths cut tab in the third and fourth positions. The diagram below shows how the folder tabs appear in the filing drawers unobstructed by the guide card tabs:



The number of folders needed in any particular installation can only be estimated. The approximate number can be determined by counting the folder captions in the outline, care being taken to include any captions that have been added in adapting the basic filing system to the school system. Since folders are usually sold in packages of 100, the best procedure is to order the next unit of 100. For example, if the estimated number of folders needed is 420, order 500.

HALF-FOLDERS

Half-folders are used in the basic filing system as locator cards and permanent cross-reference cards. Their preparation will be described under the heading "Inserting Locator Cards, Permanent Cross-Reference Cards, and Finding Aids." A half-folder is a single sheet of heavy kraft paper or other suitable paper stock having a reinforced top edge and a two-fifths cut tab in the third and fourth positions the same as the folders used in the filing system. Some suppliers do not furnish half-folders. If they are not available, half-folders can be made easily by securing folders described above and cutting them along the fold. The part of the folder with the reinforced top edge and raised tab makes a satisfactory half-folder.

Before ordering half-folders, or additional folders from which half-folders can be made, the number that will be required must be determined. As indicated previously, the locator cards, marked (L) in the filing system outline, and the permanent cross-reference cards, marked (X), are merely suggestions; the actual location of each type of card within the files and the number needed must be worked out for each installation. After determining where locator cards and cross-reference cards are to be used, it is an easy matter to count the number needed. As in ordering other materials, allow for future needs in ordering half-folders.

LABELS

Guide card labels are made of heavy white paper and come in continuous perforated strips which when typed, detached and folded can be inserted in the metal tabs of the guide cards. These labels stay cleaner longer if they are protected by small pieces of celluloid inserted in the metal tabs in front of the labels. In ordering guide cards specify that labels and celluloid inserts be furnished.

Folder labels are of light-weight paper and have a gummed backing that permits them to be attached without difficulty to the folder tabs. Some suppliers furnish only solid color labels while others make labels with a white or manila background and colored stripes running horizontally across the label. This is a "color-stripe" label. Although either type of label can be used, the typed caption is more legible on the white or manila background of the striped label than on the solid color label. Labels are available in continuous rolls of approximately 250 labels or in packages containing about the same number.

To order labels it is first necessary to estimate the approximate number of folders to be used in each section of the filing system. Allowance should be made for future expansion of each section. One package or roll of each color (except for the Administration section where two packages or rolls are needed) will be sufficient. Large installations will require additional labels. Five different colors are needed. The selection of colors will depend largely upon what the supplier can furnish but the following colors are recommended:

Administration	Blue
Instruction	Green
Equipment and Plant Operation and Maintenance	Purple
Pupils	Salmon
All Cross-Reference Cards & Locator Cards	Crimson

The use of colored labels speeds identification of the proper section of the filing system when folders are to be refiled. It also distinguishes locator cards and cross-reference cards from folders.

As an aid in securing the necessary materials for installing the filing system, ordering instructions are furnished under "Instructions for Ordering Materials," page 14.

(NOTE: THE FOLLOWING PERTAINS ONLY TO A SUSPENSION FOLDER INSTALLATION. THE GENERAL DISCUSSION OF FILING SYSTEM INSTALLATION RESUMES ON PAGE 14.)

SUSPENSION FOLDER INSTALLATION

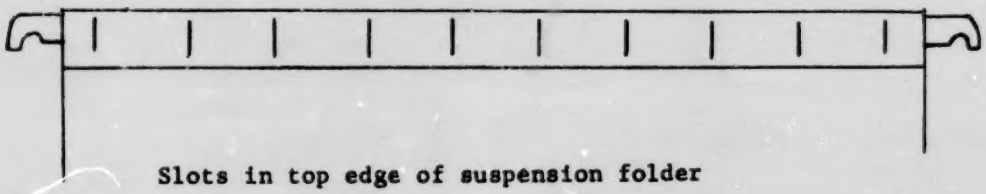
Suspension folders and guide cards used in the suspension folder installation may be either letter size or legal size depending upon the size of the filing drawers used.

GUIDE CARDS

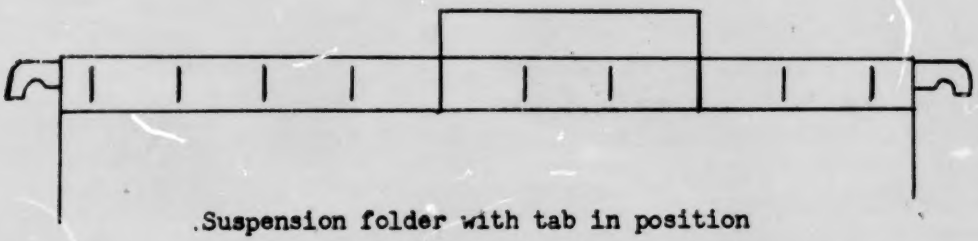
Special suspension guide cards are available for use in suspension files. They are used to show primary and secondary subject categories and to serve as aids in finding frequently used records. Their positions in the files and the method of determining the number required are the same as described on page 8.

FOLDERS

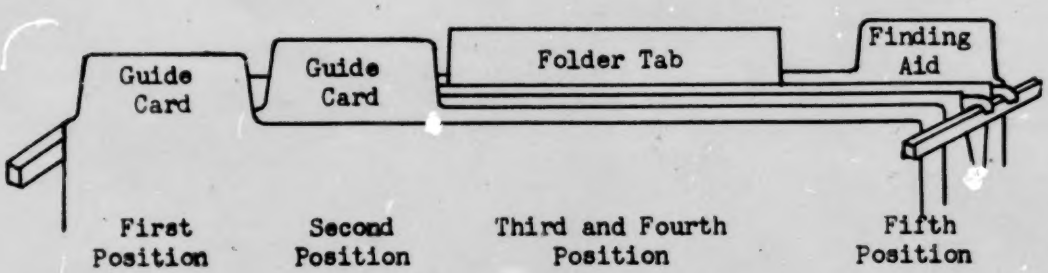
The most commonly used suspension type folders are slotted to take tabs (celluloid or metal label holders) approximately three and one-half inches wide. When the tabs are inserted in the proper slots at the top edge of the folders they will show up in the filing drawer unobstructed by the guide card tabs, as depicted in the illustration:



Slots in top edge of suspension folder



Suspension folder with tab in position



Folder tabs and guide cards in position

The approximate number that will be needed can be determined by counting the folder captions in the outline, including any captions that have been added in adapting the basic filing system to the school system. To this number must be added the number of locator cards and permanent cross-reference cards that will be needed.

LOCATOR CARDS AND CROSS-REFERENCE CARDS

For each locator card or permanent cross-reference card, half a suspension type folder, as described above, is required. Since the paper used in the manufacture of most suspension folders is too dark in color to reveal information written thereon, type the locator or cross-reference information on a sheet of paper of a lighter color (a piece of lightweight manila folder works very satisfactorily) which is then stapled to one half a folder.

As indicated previously, the number of locator cards and permanent cross-reference cards can be determined only after it has been decided where they will be used. Since two locator or permanent cross-reference cards can be made from each suspension folder, count the number needed and divide by two when ordering.

LABELS

Guide card tabs (celluloid or metal label holders) are approximately two inches wide with white paper inserts.

Suspension folder tabs (celluloid or metal label holders) are approximately three and one-half inches wide with white paper label inserts. The paper label inserts come in perforated strips which when typed, detached, and folded can be inserted in the tabs. In addition, order celluloid strips of various colors. Insert them in the folder tabs in front of the paper labels to distinguish the various sections of the files.

In selecting the colors to distinguish the various sections of the files, do not provide colored celluloid inserts for the Administration section. The identification of the Administration section is made merely by the white label. It will be necessary, however, to estimate the number of folders that will be used in each of the other sections as well as the number that will be used as locator and permanent cross-reference cards. Four different colors of celluloid strips will be required. The colors used will depend largely upon what the supplier can furnish, but the following colors are recommended:

Administration	None
Instruction	Yellow
Equipment and Plant Operation and Maintenance	Pink
Pupils	Green
All Cross-Reference Cards and Locator Cards	Red

INSTRUCTIONS FOR ORDERING MATERIALS

INSTRUCTIONS FOR ORDERING

After the basic school filing system has been adapted to the school's needs, COUNT THE NUMBER OF FIRST, SECOND AND FIFTH POSITION GUIDE CARDS; FOLDERS; HALF-FOLDERS; AND LABELS THAT WILL BE REQUIRED. IT IS ADVISABLE TO ORDER EXTRA OF EACH ITEM FOR FUTURE EXPANSION.

REGULAR INSTALLATION

Enter for each item in the space below the quantity required and the order number. If ordering from a local supplier who does not handle any of the lines listed under Partial List of Manufacturers, furnish him with the item name, quantity of each item required and the item description.

Manufacturer's Name _____

Item Name	Quantity Required	Order Number	Item Description
1st Position Guide Card	_____	_____	1/5 cut, 1st position, flat metal tab 25 pt. pressboard with blank label insert and celluloid window. (Specify letter or legal size and whether required with or without projection or lug for guide rods.)
2nd Position Guide Card	_____	_____	Same description, except 2nd position.
5th Position Guide Card	_____	_____	Same description, except 5th position.
Regular Folder	_____	_____	Individual tab kraft folder, 2/5 cut right of center (3rd and 4th positions). (Specify letter or legal size.)
Regular Half-Folder	_____	_____	Same description as folder. (Order folder and cut along fold. Use half with tab.)
Labels			Gummed or pressure sensitive label at least 3 1/2" wide. (Specify roll or package, solid color or striped and the color. Blue, green, purple, salmon and crimson are recommended, but other colors may be used.)

Color	No. rolls or packages	Order Number	Color	No. rolls or packages	Order Number
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____			

REGULAR INSTALLATION - PARTIAL LIST OF MANUFACTURERS

NOTE: Stock number is listed in column after each item.
Ltr Size means letter size. Lgl Size means legal size.
W rods means with projection or lug for guide rods.
W/o rods means without projection or lug for guide rods.

MANUFACTURER	FOLDER	GUIDE CARDS	LABELS	HALF-FOLDER
Bro-Dart Industries	Ltr Size 49 200 Lgl Size 49 201	Ltr Size 49 325 Lgl Size 49 327	49 250	Not available*
DEMCO Educational Corp.	Ltr Size 42-6490 Lgl Size 42-6500	Ltr Size W rod 42-6450 5th cut 42-6470 3rd cut Lgl Size W rod 42-6460 5th cut 42-6480 3rd cut	42-6330 (gummed) 42-6340 (pressure sensitive - not available in all colors)	Not available*
Gaylord Bros.	Ltr Size D-11521 Lgl Size D-14521	Ltr Size 1050 Lgl Size 1052 Both W rods only	Not available in all colors	Not available*
Oxford Filing Supply Co.	Ltr Size RK 154 Lgl Size XRK 153**	Ltr Size 91-5 Lgl Size 95-5 W rods or W/o rods	R 444 (gummed) DR 44 (pressure sensitive)	Not available*
Remington Rand Co.	Ltr Size 50428R Lgl Size 524281R	Ltr Size W rod 60504 1/5 Ltr Size W/o rod 605041 1/5 Lgl Size W rod 625042 1/5 Lgl Size W/o rod 625041 1/5	1819.2 (gummed) PSL-9.4 (pressure sensitive)	Ltr Size 50118 1/2R Lgl Size not available*

* Half-folder, as such, not available. Order folders and cut at fold.

** Specify tab position desired in order, for example: 2/5 cut right of center.

SUSPENSION INSTALLATION

Enter for each item in the space below the quantity required and the order number. If ordering from a local supplier who does not handle any of the lines listed under Partial List of Manufacturers, furnish him with the item name, quantity of each item required, and the item description.

Manufacturer's Name _____

Item Name	Quantity Required	Order Number	Item Description
Guide Card	_____	_____	Suspension guide card with 2" tab with blank label insert. (Specify letter or legal size.)
Suspension Folder	_____	_____	Suspension folder and 3½" tab with slots for tab in position slightly right of center. (Specify letter or legal size.)
Suspension Half-Folder	_____	_____	Same description as suspension folder. (Order suspension folder and cut along fold.)
Colored celluloid inserts for suspension folder tabs			Colored celluloid inserts for 3½" tab. (Specify colors desired. Colors recommended are yellow, pink, green, and red, but other colors may be used.)

Color	Quantity Required	Order Number	Color	Quantity Required	Order Number
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

SUSPENSION INSTALLATION - PARTIAL LIST OF MANUFACTURERS

NOTE: Stock number is listed in column after each item.
Ltr Size means letter size. Lgl Size means legal size.

MANUFACTURER	FOLDER	GUIDE CARD	TABS	HALF-FOLDER
Oxford Filing Supply Co.	Pendaflex Folder Ltr Size 4152 1/3 Lgl Size 4153 1/3	Ltr Size 4200 Lgl Size 4300	Tabs furnished with folders. Specify 3½" tab Tabs not furnished with guides. Order 2" tabs #42 Color inserts for folders only #23 CW	Not available*
Remington Rand Co.	Redi-File Folder Ltr Size 5043991 1/3 Lgl Size 5243991 1/3	Ltr Size 603991 1/5 Lgl Size 623991 1/5	Tabs furnished with folders. Specify 3½" tab Color inserts for folders only #18399-1	Not available*

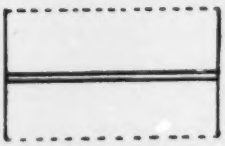
* Half-folder, as such, not available. Order sufficient folders and affix a piece of heavy paper to each folder with staples. Entries can be typed on the heavy paper.

PREPARING GUIDE CARDS, LABELS, AND FOLDERS

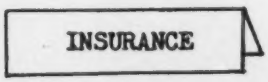
Guide cards and folders are the heart of the basic filing system and care must be used in preparing them so they are uniform and legible.

GUIDE CARD LABELS

Keep captions on guide card labels as concise as possible since the typing space is limited. Type the label in capitals on the special guide card label stock furnished. Separate the label at the perforation, fold along the crease and insert in the metal label tab. A small piece of clear sheet plastic or celluloid inserted in front of the label will protect it against smudging. Do not insert colored plastic or celluloid strips in front of the label as the color tends to obscure the typed caption.



Guide card label as it appears in strip form



Guide card label typed and folded

Guide card label inserted in metal label tab

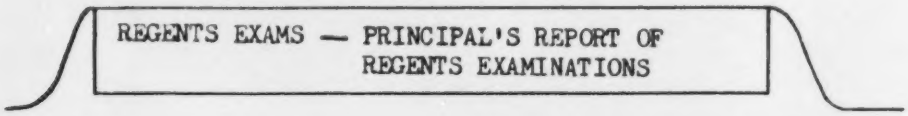
FOLDER LABELS FOR REGULAR FOLDERS

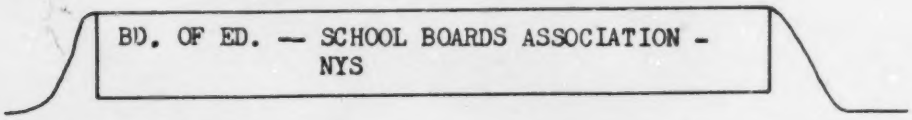
The labels for regular folders should be of good grade paper that will resist wear. They should be properly perforated to tear evenly from the roll or strip and should be coated with a high quality gum or adhesive. The color should be nonfading, uniform and distinctive.

TYPING LABELS

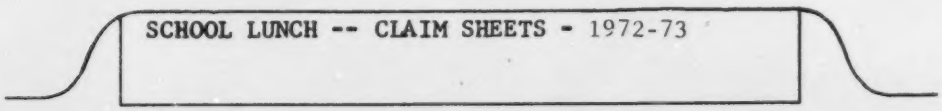
Typing labels is not difficult but use care to insure that the typed labels are neat and uniform. Select the proper colored label and type the caption in capitals. Start the caption two spaces in from the left edge of the label and just far enough below the top edge to leave a rim above the lettering. In every case the caption should be complete. The caption appearing on the guide card which immediately precedes the folder should be typed first, followed by the specific designation of the folder contents. Separate these two by a double hyphen -- so that they are readily distinguishable. If additional information is needed to explain the folder contents, it should be further separated by a

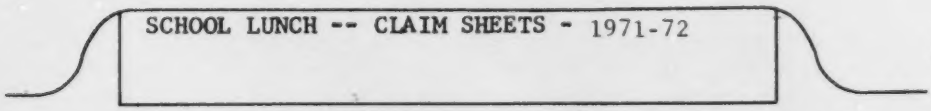
single hyphen - . Use double spaces in place of commas within the caption. If the caption requires more than one line, use the indented form so that the first word of the caption stands out clearly. DO NOT INCLUDE the (X) or (L) appearing in the filing system outline when typing captions of cross-reference and locator cards.

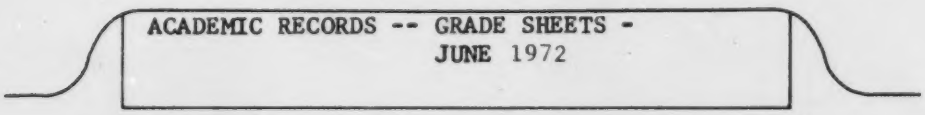


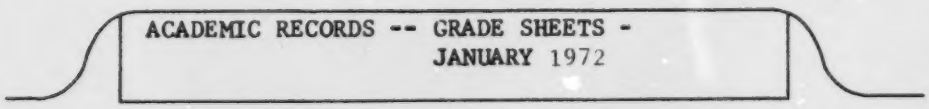


As the filing system expands additional folders will have to be prepared for the same subject classification. Differentiation between these folders is made by indicating on the folder labels the inclusive dates of the records within each folder.



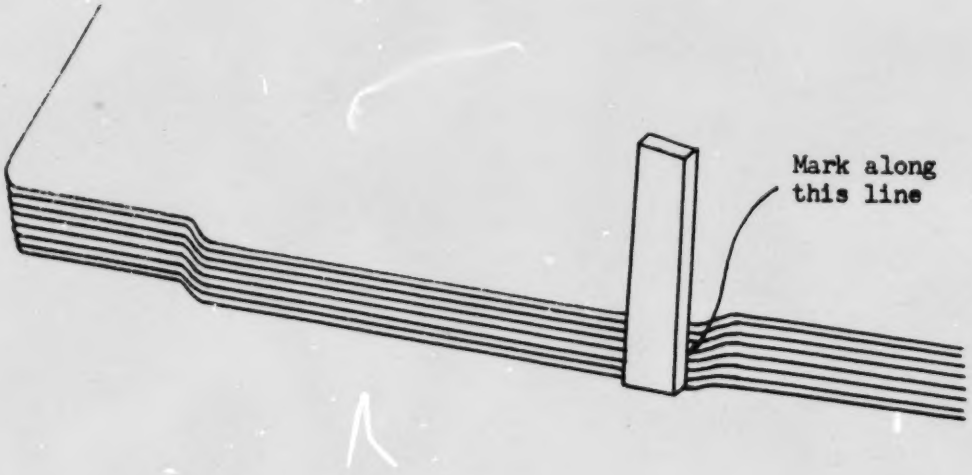






POSITIONING LABELS

For appearance, labels should be positioned uniformly on the folders. To accomplish this lay a package of folders on a table, taking care that the edges of the folders are even, and draw a pencil line along a ruler placed vertically against the stack of folders at the extreme left edge of the tab as indicated in the diagram below. The result is a pencil mark at the upper left-hand corner of each folder tab to be used as a guide in the positioning of the label. The label should be fastened as near the left edge of the folder tab as possible without any part of the label overhanging the curved corner of the tab.



ATTACHING LABELS

Pressure sensitive or non-moistening labels are now extensively used because they are much easier to handle and apply than labels requiring moisture before application. Wrinkles should be avoided.

Labels requiring moisture should be pasted to the folder tab with care to avoid air bubbles or dry spots that will cause the label to tear. A roller moistener or cellulose sponge may be used for moistening the labels. Place the moistened label on the folder tab so that the left edge of the label is in line with the pencil mark on the top edge of the folder tab. Smooth the back half of the label to the back of the folder tab first. Then press the front half of the label firmly to the tab, using a blotter or cloth to prevent smudging. Apply pressure from the middle to each end of the label to eliminate wrinkles. Air bubbles and wrinkles not only detract from the neatness of the labels but soon cause the labels to tear.

FOLDER LABELS FOR SUSPENSION FOLDERS

Labels for suspension folders come in perforated strips of heavy grade white paper stock. They should be typed in capitals in the same manner as labels for regular folders (see page 18).

After the label has been typed, it should be separated at the perforation, folded along the crease and inserted together with the appropriate colored celluloid strip (except in the case of a folder in the Administration section where a colored strip is not used) in the label holder or tab. Fasten the label holder to the folder after the label and colored strip have been inserted. Use care in securing the label holder or tab to the folder. Insert each prong of the label holder or tab in the slot provided in the top of the folder to prevent the tearing of papers placed in the folder.

INSTALLING THE FILING SYSTEM

Setting up the filing system and transferring the records from the old to the new files is the most time-consuming part of the installation. Since the completion of the installation in as short a time as possible is generally desirable, the correct procedure in making the installation is important.

As indicated previously, the best time to install the filing system is during a vacation period when there are likely to be fewer interruptions in the work and when it is easier to make space available near the files for sorting and transferring records.

If a vacation period is not a convenient time to install the filing system, it can be installed as either a full-time or part-time project during the school year. During such an installation interruptions are bound to occur since records will be needed from the files. If the installation must extend over a period of several weeks or months, both the old and the new filing systems will have to be used simultaneously until the transfer is completed and the old filing system can be eliminated. The interruptions in the installation and the operation of a dual filing system are inconveniences that can usually be handled with a few adjustments.

To guide school personnel in installing the basic filing system an installation plan has been worked out and tested. While the plan will probably require slight adjustments to fit local conditions, none of the steps should be omitted. The steps in the installation plan are as follows:

Step 1. Prepare all guide cards and folders according to the instructions given on pages 18 to 21.

Step 2. Remove records from the filing cabinets in which the basic filing system is to be installed. Keep the records in their original order and store them temporarily in any available unused filing drawers, transfer cases, or cartons.

Step 3. Insert in the emptied drawers the guide cards and folders arranged in the sequence shown in the filing system outline. Reserve two drawers each for the Administration and Instruction sections and one drawer each for the other two sections. Make adjustments in the number of drawers required as the records are transferred.

Step 4. Transfer records from the folders in the old filing system to the correct new folders. In many cases the contents of a folder will cover a single subject and may be transferred intact to the correct new folder. In other cases records in a folder will have to be resorted according to their individual subjects and refiled in several folders in the new filing system. Since the basic filing system follows a subject-matter classification, individual letters, reports, memorandums, etc. must be classified properly according to subject before they can be filed in the new filing system.

Step 5. Inspect each folder after all records have been transferred to make certain that:

a. Records have been correctly filed in the proper primary and secondary subject categories and individual folders,

b. Records within each folder have been arranged in chronological order with the newest records at the front of the folder,

c. Duplicate copies that are no longer needed have been weeded out,

d. Records eligible for disposition have been removed,

e. Misfiled records have been refiled correctly,

f. Cross-reference sheets have been prepared and inserted in the appropriate folders where necessary,

g. An additional specific folder has been made where a general folder contains five to ten papers on the same subject, and

h. An additional folder has been made when a folder contains over fifty papers (about one-half inch).

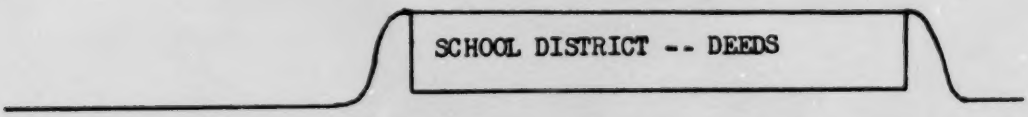
INSERTING LOCATOR CARDS, PERMANENT CROSS-REFERENCE CARDS, AND FINDING AIDS

LOCATOR CARDS

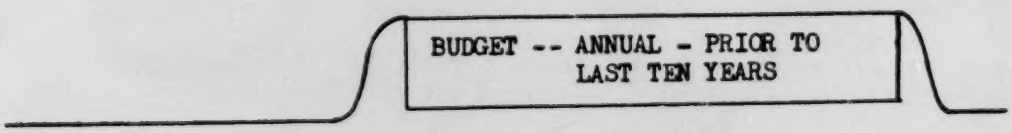
Before locator cards can be prepared and inserted in the central files to indicate the location of records outside the files, those records must be known. The easiest way to find them is to inventory all records that are kept outside the central files. The inventory should reveal the location, description and age of the records. This information will also be useful in determining which records are disposable.

Depending upon the type of installation, either a half-folder or half of a suspension folder to which has been stapled a piece of heavy paper is used for a locator card. Crimson or red labels are used for all locator cards regardless of the section in which they appear. The label is typed and attached to the locator card in the same manner that labels are applied to folders.

After the label has been affixed, a description of the record and its location are typed on the front of the locator card. If the typewriter carriage is too narrow to take the locator card lengthwise, it can be inserted endwise. When a suspension folder is used as a locator card, type the information on a heavy sheet of paper and staple the sheet to the folder. The locator card is inserted in the files at the appropriate location the same as a folder would be filed.



Deeds to school district property are located in the school vault, west side, cabinet No. 1, drawer No. 1.

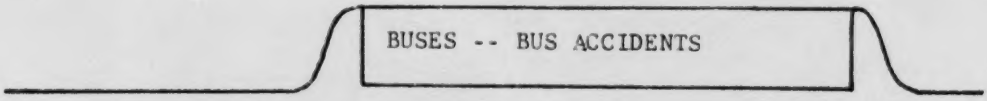


Annual budgets for years 1952 to last 10 years are in Transfer File No. 10.

PERMANENT CROSS-REFERENCE CARDS

A permanent cross-reference card is merely a locator card used to indicate records filed elsewhere in the central files. It is called permanent because it is built into the filing system as a continuing indication of records that are filed at other locations in the central files. For example, in the filing system outline all types of accident reports are grouped together under Insurance in the Administration section. In searching for accident reports involving school buses, one might reasonably look under Transportation. For this reason, a permanent cross-reference card is inserted under Transportation to indicate the location of accident reports for accidents involving school buses.

The permanent cross-reference card is prepared in the same manner as the locator card with the actual location of the record indicated on the front of the card.



See: ADMINISTRATION;
INSURANCE -- ACCIDENT REPORTS

Only a few permanent cross-reference cards are suggested in the filing system outline. They are indicated by an (X) before the caption. Local usage may necessitate the insertion of others, but the more familiar school personnel become with the filing system the fewer permanent cross-reference cards will be needed.

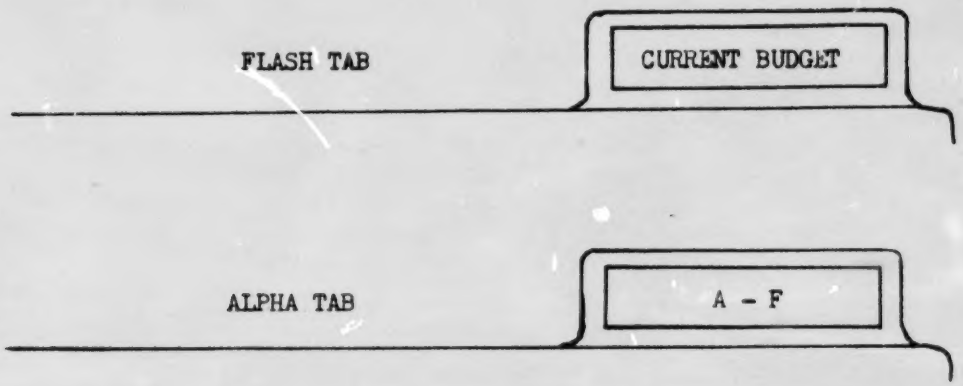
In addition to the permanent cross-reference cards that are built into the filing system, cross-reference sheets may also have to be inserted in individual folders to show the location of other records. Such sheets must be used when filing a letter or other record that covers more than one subject. A cross-reference sheet is a piece of paper, often of a distinctive color for easy recognition, inserted under one subject and indicating the location of the record filed under the second subject.

FINDING AIDS

Finding aids are incorporated into the basic filing system for the purpose of speeding up the filing and finding of records. Two types, flash tabs and alpha tabs, are used.

The flash tab is a fifth position guide card designating a record which has frequent use. It serves as a flag directing attention to the record so that it can be found quickly. Its use should be restricted to records that are important and that may have to be located with a minimum of delay. Flash tabs, included in the filing system outline for illustrative purposes only, indicate the "Current Budget," "Attendance Reports," and "Accident Reports." Others may be included as needed, but the more flash tabs that are used, the less effective each becomes. Flash tabs should be removed from the files as soon as the reference value or importance of the record they designate ceases.

Alpha tabs are fifth position guide cards that are used to break a long series of related folders into alphabetic or numeric groupings. They are used, for example, to break into alphabetic groupings a long series of vendor folders that are arranged alphabetically according to the vendors' names. The insertion of four or five guide cards with alphabetic designations in this series cuts down the searching time necessary to find a particular folder. The tabs might read A - M, N - Z, or a more complete breakdown A - F, G - L, M - S, and T - Z. The distribution of the folders in the alphabetical sequence usually determines the choice of the alpha tab pattern.



SETTING UP THE TRANSFER OR RETIREMENT FILES

Effective operation of central files that must control current records and at the same time store inactive records is practically impossible. Forcing a filing system to perform this dual function is to invite trouble. The remedy is simple. By establishing separate transfer or retirement files for older records which still have occasional reference value, the central files can be restricted to the active records.

Establishment of transfer or retirement files involves removing from the active files copies of older reports, correspondence and other records that have continuing value but a low frequency of use. The transfer or retirement files should not be considered as a long-term storage area. They may be either a temporary repository for records that may be disposed of after a few years, or they may be an intermediate repository for records that still have some reference value and will later be stored elsewhere in a long-term storage area for the duration of their retention periods.

Transfer or retirement files need not be as complex as the active files. Frequently one or two filing drawers are sufficient to accommodate all the records that will be retired. Arrange the material in the same subject-matter classification that is used in the active files. Use guide cards captioned the same as those in the active files. Prepare folder captions using the appropriate colored labels as in the case of records in the active files. The location of records in the transfer or retirement files will be indicated in the central files by locator cards.

The transfer or retirement files should be located near the active files because the records contained therein will continue to have some frequency of use. An excellent arrangement is to place the transfer or retirement files in the less accessible lower drawers of the filing cabinets housing the active files. By so doing, all of the records having any reference value are near at hand with the most desirable upper drawer locations reserved for the frequently used active files.

Local conditions will determine how frequently records must be removed from the active files to the transfer or retirement files. It is recommended that records be retired or transferred annually at the close of the school year. The records that are to be transferred should be removed from the active files and placed in the appropriate locations in the transfer or retirement files. Records already in the transfer or retirement files that are eligible for disposition should be destroyed pursuant to Section 65-b of the Public Officers Law and Part 185, Title 8, of the Official Compilation of Codes, Rules and Regulations of the State of New York, discussed in "The Disposition of Valueless Records" page 75. Records in the transfer or retirement files that no longer have reference value but that cannot be destroyed should be removed to a long-term storage area and held there until they can be destroyed.

EXTENDING THE BASIC SCHOOL FILING SYSTEM TO OTHER FILES IN THE SCHOOL SYSTEM

In most school systems many important records are located outside the central files and cannot for various reasons be centralized at one location. Accounting, purchase and paying, and other fiscal records may be in the business office; health records in the nurse's office; and departmental supervisors' records in the various departments. Where there are separate buildings in a school system, the records used in those buildings will usually be retained in them.

Control over these records can be established by inserting locator cards in the central files, but to complete the installation of the basic school filing system the records that are outside the central files should be arranged, wherever possible, in the same manner as though they were in the central files. The extension of the basic filing system to the decentralized records is usually delayed until the installation of the central files has been completed, but it should be accomplished as soon as possible thereafter to insure a uniform filing system for all school records.

Unless the records outside the central files are voluminous, the task of extending the basic school filing system to them is not difficult. They should be arranged in the same manner as prescribed in the filing system outline. For example, if a school has a business office the business records listed in the filing system outline might be filed in that office instead of in the central files. Their arrangement in the files in the business office would be the same as if they were filed in the central files.

The same materials used in setting up the central files should be used in setting up the decentralized files and should be prepared in the same way. The quantities required can be determined in the same manner as for the central files.

SCHEMATIC DIAGRAM OF THE BASIC SCHOOL FILING SYSTEM

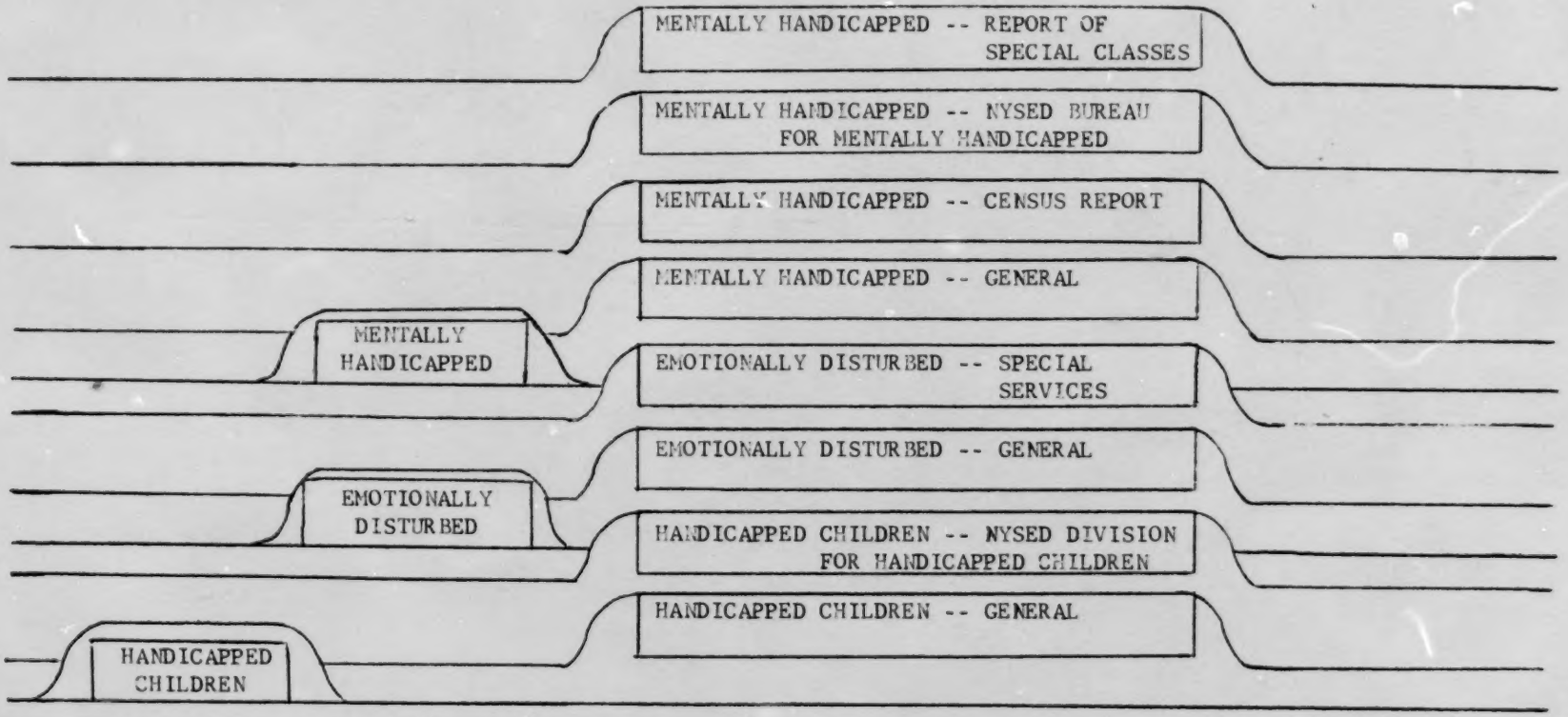
This is a portion of the filing system outline exactly as it appears on page 60.

(Read Down)

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
HANDICAPPED CHILDREN		HANDICAPPED CHILDREN -- GENERAL	
		HANDICAPPED CHILDREN -- NYSED DIVISION FOR HANDICAPPED CHILDREN	
	EMOTIONALLY DISTURBED	EMOTIONALLY DISTURBED -- GENERAL	
		EMOTIONALLY DISTURBED -- SPECIAL SERVICES	
	MENTALLY HANDICAPPED	MENTALLY HANDICAPPED -- GENERAL	
		MENTALLY HANDICAPPED -- CENSUS REPORT	
		MENTALLY HANDICAPPED -- NYSED BUREAU FOR MENTALLY HANDICAPPED	
		MENTALLY HANDICAPPED -- REPORT OF SPECIAL CLASSES	
		MENTALLY HANDICAPPED -- SPECIAL CLASSES - EDUCABLE	

This is the same portion of the filing system outline as it appears when set up in the file drawer:

(Read Up)


MENTALLY HANDICAPPED -- REPORT OF SPECIAL CLASSES
MENTALLY HANDICAPPED -- NYSED BUREAU FOR MENTALLY HANDICAPPED
MENTALLY HANDICAPPED -- CENSUS REPORT
MENTALLY HANDICAPPED -- GENERAL
MENTALLY HANDICAPPED
EMOTIONALLY DISTURBED -- SPECIAL SERVICES
EMOTIONALLY DISTURBED -- GENERAL
EMOTIONALLY DISTURBED
HANDICAPPED CHILDREN -- NYSED DIVISION FOR HANDICAPPED CHILDREN
HANDICAPPED CHILDREN -- GENERAL
HANDICAPPED CHILDREN

This is a first position guide card used to indicate a primary subject category of the basic filing system.

This is a second position guide card representing a secondary subject category.

These are folders. One folder for each specific subject. A "General" folder usually follows each primary and secondary guide card for those records for which no specific folder is provided.

A fifth position guide card is used as a "Flash Tab" to locate a frequently used or important folder or an "Alpha Tab" to break up a long series of folders. (See page 25.)

A WORD ABOUT USING GENERAL FOLDERS

The filing system outline presented on the following pages provides a place for filing all records by subject. Note that in every instance the outline is arranged from the general to the specific, for example:

HANDICAPPED CHILDREN

- HANDICAPPED CHILDREN -- GENERAL
- HANDICAPPED CHILDREN -- NYSED DIVISION FOR HANDICAPPED CHILDREN

EMOTIONALLY DISTURBED

- EMOTIONALLY DISTURBED -- GENERAL
- EMOTIONALLY DISTURBED -- SPECIAL SERVICES

MENTALLY HANDICAPPED

- MENTALLY HANDICAPPED -- GENERAL
- MENTALLY HANDICAPPED -- CENSUS REPORT
- MENTALLY HANDICAPPED -- NYSED BUREAU FOR MENTALLY HANDICAPPED
- MENTALLY HANDICAPPED -- REPORT OF SPECIAL CLASSES
- MENTALLY HANDICAPPED -- SPECIAL CLASSES - EDUCABLE

Readily identified records such as attendance reports, census and enrollment reports, payrolls, personnel records, etc. are frequently filed by their subject in existing files. First, transfer these records from your present file to the basic filing system. Then, transfer records having subjects more difficult to identify. Examples of such records are correspondence and contents of "name" and "miscellaneous" folders that have to be filed by <u>subject</u> in the basic filing system. Unless a specific folder is obviously appropriate for a certain record, the record will be filed in the <u>general</u> folder found immediately behind most primary or secondary subject category guide cards.

Upon the completion of the transfer of all records to the basic filing system, each <u>general</u> folder should be inspected to determine if any portion of the contents is of sufficient volume or importance to warrant transfer to a more specifically captioned individual folder. Normally, the presence of thick (½ inch or more) <u>general</u> folders indicates that additional specific subject folders are required. Remove from a <u>general</u> folder five or more papers related to one subject and prepare a specific subject folder for them.

Periodically inspect the <u>general</u> folders to determine if records relating to specific subjects should be transferred either to an existing specific subject folder or to a newly prepared specific subject folder. In this manner the basic filing system "grows" through the process of subdividing the <u>general</u> folders into specific subject folders.

OUTLINE OF BASIC FILING SYSTEM

ADMINISTRATION

(COLOR -- BLUE)

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
AUDITS		AUDITS -- LOCAL REPORTS	
		AUDITS -- STATE COMPTROLLER'S REPORTS	
BOARD OF COOPERATIVE EDUCATIONAL SERVICES		BD. OF COOP. EDUC. SERV. -- GENERAL	
		BD. OF COOP. EDUC. SERV. -- BUDGET	
		BD. OF COOP. EDUC. SERV. -- CONTRACTS	
		BD. OF COOP. EDUC. SERV. -- FINANCE	
		BD. OF COOP. EDUC. SERV. -- LEGAL	
		BD. OF COOP. EDUC. SERV. -- MEETINGS	
		BD. OF COOP. EDUC. SERV. -- SERVICES	
BOARD OF EDUCATION		BD. OF EDUC. -- GENERAL	
		BD. OF EDUC. -- MEETINGS - AGENDA SENT TO MEMBERS	
		(L) BD. OF EDUC. -- MINUTES OF MEETINGS	
		(L) BD. OF EDUC. -- OATHS OF OFFICE	
		BD. OF EDUC. -- POLICIES	
		BD. OF EDUC. -- SCHOOL BDS. ASSN. - COUNTY	
		BD. OF EDUC. -- SCHOOL BDS. ASSN. - NYS	
		BD. OF EDUC. -- SCHOOL BD. INSTITUTES	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
BUDGET			FLASH TAB CURRENT BUDGET
		BUDGET -- ANNUAL - CURRENT	
		BUDGET -- ANNUAL - LAST TEN YEARS	
	(L)	BUDGET -- ANNUAL - PRIOR TO LAST TEN YEARS	
		BUDGET -- ANNUAL - BUDGET REQUESTS (Budget requests used in preparation of budget and then as basis for purchasing are filed here.)	
BUSINESS MANAGER			
		BUSINESS MANAGER -- GENERAL	
		BUSINESS MANAGER -- REPORTS	
		BUSINESS MANAGER -- SURETY BOND	
CALENDARS			
		CALENDARS -- GENERAL	
CENSUS			
		CENSUS -- CENSUS AND AGE GRADE TABLES - MIGRANT CHILDREN	
		CENSUS -- CENSUS AND ENROLLMENT REPORTS - ANNUAL	
	(L)	CENSUS -- CENSUS CARDS	
	(L)	CENSUS -- CENSUS LISTS	
	(X)	CENSUS -- HANDICAPPED CHILDREN (See INSTRUCTION; HANDICAPPED CHILDREN)	
CIVIL DEFENSE			
		CIVIL DEFENSE -- GENERAL	
		CIVIL DEFENSE -- GO HOME PLAN	
		CIVIL DEFENSE -- NYSED COORDINATOR	
		CIVIL DEFENSE -- SHELTER DRILLS	
CLERK			
		CLERK -- GENERAL	
		CLERK -- REPORTS - ANNUAL	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
COLLECTOR		COLLECTOR -- GENERAL	
		COLLECTOR -- REPORTS	
		COLLECTOR -- SURETY BOND	
COUNTY VOCATIONAL EDUC. & EXT. BD.		CO. VOC. EDUC. & EXT. BD. -- GENERAL	
		CO. VOC. EDUC. & EXT. BD. -- BUDGET	
		CO. VOC. EDUC. & EXT. BD. -- CONTRACTS	
		CO. VOC. EDUC. & EXT. BD. -- FINANCE	
		CO. VOC. EDUC. & EXT. BD. -- LEGAL	
		CO. VOC. EDUC. & EXT. BD. -- MEETINGS	
		CO. VOC. EDUC. & EXT. BD. -- SERVICES	
DISTRICT PRINCIPAL		DISTRICT PRINCIPAL -- GENERAL	
		DISTRICT PRINCIPAL -- COUNTY PRINCIPALS ASSOCIATION	
		DISTRICT PRINCIPAL -- NYS COUNCIL OF SCHOOL DISTRICT ADMINISTRATORS	
		DISTRICT PRINCIPAL -- REPORTS TO BOARD OF EDUCATION	
		DISTRICT PRINCIPAL -- RESERVATIONS	
		DISTRICT PRINCIPAL -- TRAVEL EXPENSE	
DISTRICT SUPERINTENDENT		DISTRICT SUPERINTENDENT -- GENERAL	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
ELECTIONS		ELECTIONS -- CHALLENGE OF VOTER'S QUALIFICATIONS	
		ELECTIONS -- DECLARATION OF A CHALLENGED VOTER	
		ELECTIONS -- ELECTION INSPECTORS' STATEMENT OF CANVASS	
		ELECTIONS -- PETITION NOMINATING CANDIDATE FOR BOARD OF EDUCATION	
		ELECTIONS -- POLL LIST OF VOTERS	
	(L)	ELECTIONS -- REGISTERS OF VOTERS	
		ELECTIONS -- STATEMENT OF VOTER'S QUALIFICATIONS	
		ELECTIONS -- STATEMENT OF VOTER'S CORRECT ADDRESS	
EMPLOYMENT CERTIFICATES		EMPLOYMENT CERTIFICATES -- GENERAL	
		EMPLOYMENT CERTIFICATES -- REPORT OF EMPLOYMENT CERTIFICATES ISSUED	
		EMPLOYMENT CERTIFICATES -- CHILD ENTERTAINER	
		EMPLOYMENT CERTIFICATES -- CHILD MODEL	
		EMPLOYMENT CERTIFICATES -- FARM WORK	
		EMPLOYMENT CERTIFICATES -- FARM WORK SPECIAL	
		EMPLOYMENT CERTIFICATES -- FULL-TIME	
		EMPLOYMENT CERTIFICATES -- LIMITED	
		EMPLOYMENT CERTIFICATES -- NEWSPAPER CARRIER	
		EMPLOYMENT CERTIFICATES -- NONFACTORY	
		EMPLOYMENT CERTIFICATES -- SPECIAL	
		EMPLOYMENT CERTIFICATES -- STREET TRADES	
		EMPLOYMENT CERTIFICATES -- STUDENT GENERAL	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
FINANCE		FINANCE -- DEBT STATEMENT - ANNUAL	
		FINANCE -- NYSED DIVISION OF EDUCATIONAL FINANCE	
		FINANCE -- NYSED DIVISION OF EDUCATIONAL MANAGEMENT SERVICES - GENERAL	
		FINANCE -- NYSED DIVISION OF EDUCATIONAL MANAGEMENT SERVICES - NEWSLETTER	
		FINANCE -- TAX EXEMPTION CERTIFICATES (Tax exemption certificates exempt the school from collecting entertainment tax on school entertainment.)	
	ACCOUNTING	(L) ACCOUNTING -- BANK BOOK	
		(L) ACCOUNTING -- BANK DEPOSIT SLIPS	
		(L) ACCOUNTING -- BANK STATEMENTS	
		(L) ACCOUNTING -- CASH BOOK	
		(L) ACCOUNTING -- CHECKS - CANCELED	
		(L) ACCOUNTING -- JOURNALS	
		(L) ACCOUNTING -- LEDGERS	
	FINANCIAL REPORTS	FINANCIAL REPORTS -- ANNUAL TO COMPTROLLER	
		FINANCIAL REPORTS -- ANNUAL TO NYSED - CURRENT AND LAST TEN YEARS	
		(L) FINANCIAL REPORTS -- ANNUAL TO NYSED - PRIOR TO LAST TEN YEARS	
	INCOME-ANTICIPATION NOTES	INCOME-ANTICIPATION NOTES -- BOND	
		INCOME-ANTICIPATION NOTES -- SCHEDULE OF INDEBTEDNESS FOR DISTRICTS ISSUING BOND ANTICIPATION NOTES	
		INCOME-ANTICIPATION NOTES -- REVENUE	
		INCOME-ANTICIPATION NOTES -- TAX	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(FINANCE)			
	INCOME-BONDS	INCOME-BONDS -- APPLICATION TO BOARD OF REGENTS FOR APPROVAL OF BOND ISSUE	
		(L) INCOME-BONDS -- BOND REGISTER	
		INCOME-BONDS -- (Indicate object and date of bond sale.)	
		INCOME-BONDS -- CANCELED COUPONS	
		INCOME-BONDS -- CREMATION CERTIFICATES	
		INCOME-BONDS -- REDEEMED BONDS	
	INCOME-FEDERAL AID	INCOME-FEDERAL AID -- GENERAL	
		INCOME-FEDERAL AID -- ESEA TITLE I (Application for ESEA Federal aid should be filed here; program content, evaluation, reports, etc. should be filed according to subject of individual program, usually within INSTRUCTION.)	
		INCOME-FEDERAL AID -- ESEA TITLE II	
		INCOME-FEDERAL AID -- ESEA TITLE III	
		INCOME-FEDERAL AID -- FEDERALLY AFFECTED AREAS - CONSTRUCTION (PL 815)	
		INCOME-FEDERAL AID -- FEDERALLY AFFECTED AREAS - CURRENT EXPENSES (PL 874)	
		INCOME-FEDERAL AID -- INDUSTRIAL ARTS EDUCATION	
		INCOME-FEDERAL AID -- LITERACY - EDUCATION/WELFARE	
		INCOME-FEDERAL AID -- MANPOWER DEVELOPMENT & TRAINING	
		INCOME-FEDERAL AID -- MODEL CITIES PROGRAM	
		INCOME-FEDERAL AID -- NATIONAL DEFENSE EDUCATION ACT	
		INCOME-FEDERAL AID -- VOCATIONAL EDUCATION	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(FINANCE)			
	INCOME-FEES & FINES	INCOME-FEES & FINES -- GENERAL	
		INCOME-FEES & FINES -- LIBRARY	
		INCOME-FEES & FINES -- LOCKERS	
		INCOME-FEES & FINES -- MISCELLANEOUS (Records relating to miscellaneous fees and fines, such as payments for damages to school property, janitorial services for non-school functions, etc. should be filed here.)	
		INCOME-FEES & FINES -- MUSICAL INSTRUMENTS	
		INCOME-FEES & FINES -- TEXTBOOKS	
	INCOME-INTEREST & PROFITS	INCOME-INTEREST & PROFITS -- DEPOSITS & INVESTMENTS	
	INCOME-RENTALS	INCOME-RENTALS -- GENERAL	
	INCOME-SALE OF PROPERTY	INCOME-SALE OF PROPERTY -- REAL -	
		INCOME-SALE OF PROPERTY -- SURPLUS - (Make a folder for each piece of real property or type of surplus property which has been sold or is to be sold.)	
	INCOME-STATE AID	INCOME-STATE AID -- GENERAL	
		INCOME-STATE AID -- EXPERIMENTAL PROGRAM - CULTURALLY DEPRIVED GROUPS	
		INCOME-STATE AID -- EXPERIMENTAL PROGRAMS TO IMPROVE QUALITY OF EDUCATION	
		INCOME-STATE AID -- GROWTH AID	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(FINANCE)			
	(INCOME-STATE AID)	INCOME-STATE AID -- SIZE CORRECTION AID	
		INCOME-STATE AID -- SUMMER SCHOOL FOR MIGRANT CHILDREN	
		INCOME-STATE AID -- URBAN EDUCATION	
		INCOME-STATE AID -- WORKSHEETS FOR COMPUTING STATE AID (Make an individual folder for each year.)	
	INCOME-TAXATION	INCOME-TAXATION -- GENERAL	
		INCOME-TAXATION -- ASSESSMENTS	
		INCOME-TAXATION -- EQUALIZATION	
		INCOME-TAXATION -- PETITION FOR RELIEF	
		INCOME-TAXATION -- RESERVE FUND - CAPITAL	
		INCOME-TAXATION -- RESERVE FUND - REPAIRS	
		INCOME-TAXATION -- SALES TAX	
		INCOME-TAXATION -- TAX LEVY REPORTS	
		(L) INCOME-TAXATION -- TAX LIST	
		(L) INCOME-TAXATION -- TAX RECEIPTS	
		INCOME-TAXATION -- TAX REFERENDUM	
		INCOME-TAXATION -- UTILITIES TAX	
	INCOME-TRUST FUNDS	INCOME-TRUST FUNDS -- GENERAL	
		INCOME-TRUST FUNDS -- (Make a folder for each trust fund and indicate by name.)	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(FINANCE)			
	INCOME-TUITION		
		INCOME-TUITION -- GENERAL	
		INCOME-TUITION -- NON-RESIDENT CLAIMS	
		INCOME-TUITION -- TUITION LISTS	
	PURCHASE CONTRACTS		
		PURCHASE CONTRACTS -- (Prepare a separate folder for each purchase contract made. Specifications, proof of publication, bids, and other records related to the award of a purchase contract should be filed in a folder properly identified as in the example below.)	

	PURCHASE CONTRACTS		
		PURCHASE CONTRACTS -- NYS OGS DIVISION OF STANDARDS & PURCHASE - GENERAL	
		PURCHASE CONTRACTS -- NYS OGS DIVISION OF STANDARDS & PURCHASE - CONTRACTS	
		PURCHASE CONTRACTS -- BUS NO. 10	
		PURCHASE CONTRACTS -- BUS NO. 11	
		PURCHASE CONTRACTS -- FUEL OIL - 1970-71	
		PURCHASE CONTRACTS -- FUEL OIL - 1971-72	
		PURCHASE CONTRACTS -- GASOLINE - 1971-72	
		PURCHASE CONTRACTS -- PAINTING - 1972	

	PURCHASE AND PAYING		
		(L) PUR. & PAY. -- PURCHASE REQUISITIONS	
		(L) PUR. & PAY. -- PURCHASE ORDERS	
		(L) PUR. & PAY. -- VOUCHERS	
		(L) PUR. & PAY. -- CLAIM FORMS & INVOICES	
		PUR. & PAY. -- SCHEDULES OF BILLS	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(FINANCE)			
	PUR. & PAY.		
	VENDOR FOLDERS		ALPHA TAB
		VENDOR --	A-E
		(Make individual folders by the name of vendor. If number of vendors is large, it is advisable to use individual name folders for vendors with whom a large volume of business is transacted and to file the remaining vendors by name in alphabetized folders. Include a folder for VENDOR -- STATE EDUCATIONAL AGENCY FOR SURPLUS PROPERTY. If number of folders is large, alpha tabs such as A-E, F-J, etc. should be used in fifth position.)	
	QUOTATIONS		
		QUOTATIONS -- ART SUPPLIES - 1972-73	
		QUOTATIONS -- HEALTH SUPPLIES - 1972-73 (Make a separate folder for each set of specifications submitted to vendors together with the returned quotations. These quotations are not sealed bids and no contract is entered into.)	
HANDBOOK			
		HANDBOOK -- CURRENT YEAR	
		HANDBOOK -- PRIOR YEARS	
INSURANCE			
		INSURANCE -- GENERAL	
			FLASH TAB
			ACCIDENT
			REPORTS
		INSURANCE -- ACCIDENT REPORTS - EMPLOYEES	
		INSURANCE -- ACCIDENT REPORTS - PUPILS & TRAINEES	
		INSURANCE -- BOILER INSPECTIONS	
		INSURANCE -- CLAIMS	
		INSURANCE -- INSURANCE ADVISER	
		(L) INSURANCE -- INSURANCE APPRAISAL REPORTS	
		(L) INSURANCE -- INSURANCE POLICIES (Current policies are usually kept in vault or safe; expired policies are retired to storage area pending expiration of their retention periods.)	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(INSURANCE)			
		(L) INSURANCE -- INSURANCE REGISTER	
		(L) INSURANCE -- PROPERTY INVENTORY	
		INSURANCE -- PUPIL ACCIDENT COVERAGE	
		INSURANCE -- WORKMEN'S COMPENSATION (Where accumulation is large, make annual folders.)	
LEGAL			
		LEGAL -- AGREEMENTS, LEASES, AND OTHER LEGAL DOCUMENTS	
		LEGAL -- ATTORNEY FOR THE BOARD	
		(X) LEGAL -- CLAIMS COVERED BY INSURANCE (See ADMINISTRATION; INSURANCE -- CLAIMS)	
		LEGAL -- DECISIONS OF COMMISSIONER OF EDUCATION	
		LEGAL -- OPINIONS OF NYSED COUNSEL AND LAW DIVISION	
		LEGAL -- RECOMMENDATIONS ON LEGISLATION	
PAYROLL			
		PAYROLL -- GENERAL	
		PAYROLL -- ANNUAL REPORT TO NEW YORK STATE TEACHERS RETIREMENT BOARD	
		PAYROLL -- DEDUCTIONS - GENERAL	
		PAYROLL -- DEDUCTIONS - GARNISHEES	
		PAYROLL -- DEDUCTIONS - HEALTH INSURANCE	
		PAYROLL -- DEDUCTIONS - LIFE INSURANCE	
		PAYROLL -- DEDUCTIONS - NYS EMPLOYEES RETIREMENT	
		PAYROLL -- DEDUCTIONS - NYS TEACHERS RETIREMENT	
		PAYROLL -- DEDUCTIONS - SAVINGS BONDS	
		PAYROLL -- DEDUCTIONS - SOCIAL SECURITY	
		(L) PAYROLL -- EMPLOYEES EARNINGS RECORD CARDS	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(PAYROLL)			
		PAYROLL -- EMPLOYEES WITHHOLDING EXEMPTION CERTIFICATES	
		PAYROLL -- EMPLOYER'S WITHHOLDING TAX REPORTS - FEDERAL	
		PAYROLL -- EMPLOYER'S WITHHOLDING TAX REPORTS - NYS	
		(L) PAYROLL -- PAYROLLS	
		PAYROLL -- SALARY CHANGE NOTICES	
PERSONNEL			
		PERSONNEL -- GENERAL	
		PERSONNEL -- EMPLOYMENT REPORT TO FEDERAL GOVERNMENT	
		PERSONNEL -- HEALTH INSURANCE COVERAGE	
		PERSONNEL -- LIFE INSURANCE COVERAGE	
		PERSONNEL -- MILITARY SERVICE	
		PERSONNEL -- SOCIAL SECURITY COVERAGE	
	NON-PROFESSIONAL		
		NON-PROFESSIONAL -- APPLICATIONS - NOT HIRED	
		NON-PROFESSIONAL -- CIVIL SERVICE EXAM ANNOUNCEMENTS	
		NON-PROFESSIONAL -- CIVIL SERVICE POSITION CLASSIFICATIONS	
		NON-PROFESSIONAL -- CONTRACTS	
		NON-PROFESSIONAL -- GRIEVANCES	
		NON-PROFESSIONAL -- NEGOTIATIONS	
		NON-PROFESSIONAL -- OATHS OR STATEMENTS PRESCRIBED BY EDUCATION LAW	
		NON-PROFESSIONAL -- PERIODIC REPORT OF NON-CERTIFIED PERSONNEL	
		NON-PROFESSIONAL -- PUBLIC EMPLOYMENT RELATIONS BOARD	
		NON-PROFESSIONAL -- RETIREMENT - NYS EMPLOYEES RETIREMENT SYSTEM	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID

(PERSONNEL)

NON-PROFESSIONAL EMPLOYEES*

NON-PROFESSIONAL EMPLOYEE --
(Prepare an individual folder for each non-professional employee, for example, NON-PROFESSIONAL EMPLOYEE -- JOHN DOE)

*Larger schools may wish to group the various types of non-professional personnel by inserting appropriate flash tabs. Following each flash tab the individual folders should be arranged alphabetically by last name.

NON-PROFESSIONAL EMPLOYEES

FLASH TAB
BUS DRIVERS

NON-PROFESSIONAL EMPLOYEE -- CARL SMITH

FLASH TAB
CAFETERIA

NON-PROFESSIONAL EMPLOYEE -- EMMA HOWELL

FLASH TAB
CUSTODIAL

NON-PROFESSIONAL EMPLOYEE -- ROBERT JONES

FLASH TAB
OFFICE

NON-PROFESSIONAL EMPLOYEE -- MARY NOLAN

NON-PROFESSIONAL FORMER EMPLOYEES

NON-PROFESSIONAL EMPLOYEE --
(When a non-professional person leaves the employ of the district, remove his folder from the active group of NON-PROFESSIONAL EMPLOYEES. Mark on the folder label the date the former employee left, and place the folder in alphabetical order behind the guide card NON-PROFESSIONAL FORMER EMPLOYEES. The date on the label is an indication that the indiviual is no longer employed.)

PROFESSIONAL

PROFESSIONAL -- GENERAL

PROFESSIONAL -- ADDRESSES

PROFESSIONAL -- AGENCIES - COLLEGE

PROFESSIONAL -- AGENCIES - PRIVATE

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(PERSONNEL)			
	(PROFESSIONAL)		
		PROFESSIONAL -- ANNUAL REPORT OF PROFESSIONAL POSITIONS	
		PROFESSIONAL -- ANNUAL REPORT OF SUBSTITUTE TEACHERS	
		PROFESSIONAL -- APPLICATIONS - NOT HIRED (You may wish to make separate folders for the various types of positions, for example, PROFESSIONAL -- APPLICATIONS - ART; PROFESSIONAL -- APPLICATIONS - MATHEMATICS; etc.)	
		PROFESSIONAL -- BULLETINS	
		PROFESSIONAL -- CONTRACT STUDIES	
		PROFESSIONAL -- CONTRACTS	
		PROFESSIONAL -- GRIEVANCES	
		PROFESSIONAL -- LEAVE OF ABSENCE - GENERAL	
		PROFESSIONAL -- NEGOTIATIONS	
		PROFESSIONAL -- NYSED DIVISION OF TEACHER EDUCATION & CERTIFICATION - GENERAL	
		PROFESSIONAL -- NYSED DIVISION OF TEACHER EDUCATION & CERTIFICATION - REGULATIONS	
		PROFESSIONAL -- OATHS OR STATEMENTS PRESCRIBED BY EDUCATION LAW	
		PROFESSIONAL -- PUBLIC EMPLOYMENT RELATIONS BOARD	
		PROFESSIONAL -- RECOMMENDATIONS TO DIST. SUPT. FOR HIRING	
		PROFESSIONAL -- RETIREMENT REPORT OF SUPERINTENDENT	
		PROFESSIONAL -- RETIREMENT - NYS TEACHERS RETIREMENT BOARD	
		PROFESSIONAL -- SUBSTITUTE TEACHERS AVAILABLE	
		PROFESSIONAL -- TENURE	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(PERSONNEL)			
	PROFESSIONAL ASSOCIATIONS	PROFESSIONAL ASSNS. -- COUNTY TEACHERS ASSN.	
		PROFESSIONAL ASSNS. -- LOCAL FACULTY ASSN.	
		PROFESSIONAL ASSNS. -- NATIONAL EDUCATION ASSN.	
		PROFESSIONAL ASSNS. -- NYS TEACHERS ASSN.	
	PROFESSIONAL CONFERENCES	PROFESSIONAL CONFS. -- ELEMENTARY TEACHERS CONFERENCES	
		PROFESSIONAL CONFS. -- FACULTY MEETINGS	
		PROFESSIONAL CONFS. -- SECONDARY TEACHERS CONFERENCES	
		PROFESSIONAL CONFS. -- SUPERVISORY DISTRICT TEACHERS CONFERENCES	
		PROFESSIONAL CONFS. -- TEACHERS' REPORTS OF CONFERENCES ATTENDED	
	PROFESSIONAL EMPLOYEES*	PROFESSIONAL EMPLOYEE -- (Prepare an individual folder for each professional employee, for example, PROFESSIONAL EMPLOYEE -- JANE DOE)	

*Larger schools may find it convenient to group professional employees' folders into separate categories by inserting appropriate flash tabs. Following each flash tab the individual folders should be arranged alphabetically by last name.

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
	PROFESSIONAL EMPLOYEES		
		FLASH TAB ELEMENTARY	
		PROFESSIONAL EMPLOYEE -- NANCY MELLOW	
		PROFESSIONAL EMPLOYEE -- ANNA SMITH	
		FLASH TAB SECONDARY	
		PROFESSIONAL EMPLOYEE -- ROBERT ANDREWS	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(PERSONNEL)	(PROFESSIONAL EMPLOYEES)		
		PROFESSIONAL EMPLOYEE -- WILLIAM PIKE	FLASH TAB SPECIAL
		PROFESSIONAL EMPLOYEE -- DONALD THOMPSON	FLASH TAB SUPERVISORY
	PROFESSIONAL FORMER EMPLOYEES	PROFESSIONAL EMPLOYEE -- (When a professional person leaves the employ of the district, his folder should be removed from the active group of PROFESSIONAL EMPLOYEES. Mark on the folder label the date the former employee left and place the folder in alphabetical order behind the guide card PROFESSIONAL FORMER EMPLOYEES. The date on the label is an indication that the individual is no longer employed.)	
	PROFESSIONAL TRAINING	PROFESSIONAL TRAINING -- GENERAL	
		PROFESSIONAL TRAINING -- APPROVAL OF PROFESSIONAL STUDY (Approval of an individual's professional training would be filed in that individual's folder under PERSONNEL, PROFESSIONAL EMPLOYEES)	
		PROFESSIONAL TRAINING -- CADET TEACHERS	
		PROFESSIONAL TRAINING -- IN-SERVICE TRAINING	
PLANNING		PLANNING -- GENERAL	
		PLANNING -- FALL SURVEY OF PUPILS, STAFF AND SCHOOLHOUSING	
		PLANNING -- NYSED INFORMATION CENTER ON EDUCATION	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
PUBLIC RELATIONS		PUBLIC RELATIONS -- CELEBRATIONS AND OBSERVANCES	
		PUBLIC RELATIONS -- NEWSPAPER CLIPPINGS	
		PUBLIC RELATIONS -- NEWSPAPER RELEASES	
		PUBLIC RELATIONS -- RADIO AND TELEVISION	
		PUBLIC RELATIONS -- SCHOOL NEWSLETTERS	
	COMMUNITY ACTIVITIES	(Make a folder for each organization sponsoring activities in which there is school participation or interest. See example below.)	

	COMMUNITY ACTIVITIES	COMMUNITY ACTIVITIES -- AMERICAN LEGION	
		COMMUNITY ACTIVITIES -- FOUR H CLUB	
		COMMUNITY ACTIVITIES -- PARENT-TEACHER ASSOCIATION	
		COMMUNITY ACTIVITIES -- RED CROSS	
		COMMUNITY ACTIVITIES -- SCHOOL-PARENT COUNCIL	
		COMMUNITY ACTIVITIES -- SCOUTS - BOYS	
		COMMUNITY ACTIVITIES -- SCOUTS - GIRLS	
		COMMUNITY ACTIVITIES -- WOODSIDE VISITING NURSE ASSOCIATION	

RACIAL IMBALANCE		RACIAL IMBALANCE -- GENERAL	
		RACIAL IMBALANCE -- NYSED DIVISION OF INTERCULTURAL RELATIONS	
		RACIAL IMBALANCE -- RACIAL CENSUS	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
RECORDS MANAGEMENT		RECORDS MANAGEMENT -- GENERAL	
		RECORDS MANAGEMENT -- INACTIVE RECORDS STORAGE	
		RECORDS MANAGEMENT -- MICROFILMING	
		RECORDS MANAGEMENT -- OUTLINE OF FILING SYSTEM	
		RECORDS MANAGEMENT -- RECORDS DISPOSITION REQUESTS	
RECREATION		RECREATION -- GENERAL	
		RECREATION -- NYS YOUTH COMMISSION	
		RECREATION -- PLAYGROUNDS	
		RECREATION -- REPORTS	
		RECREATION -- SWIMMING POOL	
RESEARCH		RESEARCH -- NYSED DIVISION OF RESEARCH AND EVALUATION	
		RESEARCH -- CENTRAL SCHOOL BOARDS COMMITTEE FOR EDUCATIONAL RESEARCH	
		RESEARCH -- (Materials relating to a cooperative area study program, such as Capital Area School Development Association, should be filed here or the location of records relating to a study program should be indicated by a locator card. In either case, the folder caption would read, for example, RESEARCH -- CAPITAL AREA SCHOOL DEVELOPMENT ASSOCIATION.)	
		RESEARCH -- NYS ASSOCIATION FOR SUPERVISION AND CURRICULUM DEVELOPMENT	
		RESEARCH -- NYS CITIZENS COMMITTEE FOR PUBLIC SCHOOLS	
		(Material relating to any internal research project should be filed according to subject, for example, a study of attendance would be filed under ATTENDANCE in INSTRUCTION section, a study of the athletic program under ATHLETICS in INSTRUCTION section, a study of the social studies curriculum under CURRICULUM -- SOCIAL STUDIES in INSTRUCTION section.)	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
SCHOOL BUILDING USE			
	COMMUNITY USE OF BUILDINGS		
		COMMUNITY USE OF BLDG. -- GENERAL	
		COMMUNITY USE OF BLDG. -- ELECTIONS	
		COMMUNITY USE OF BLDG. -- POLICY	
		COMMUNITY USE OF BLDG. -- RECREATION	
		COMMUNITY USE OF BLDG. -- REQUESTS FOR	
		COMMUNITY USE OF BLDG. -- SCOUTS	
	SCHOOL USE OF BUILDINGS		
		SCHOOL USE OF BLDG. -- GENERAL	
		SCHOOL USE OF BLDG. -- AUDITORIUM	
		SCHOOL USE OF BLDG. -- CLASSROOMS	
		SCHOOL USE OF BLDG. -- GYMNASIUM	
		SCHOOL USE OF BLDG. -- POLICY	
SCHOOL DISTRICT			
		SCHOOL DISTRICT -- GENERAL	
		SCHOOL DISTRICT -- BOUNDARY DETERMINATIONS	
		SCHOOL DISTRICT -- CENTRALIZATION	
		SCHOOL DISTRICT -- CONTRACTS - OTHER DISTRICTS	
		(L) SCHOOL DISTRICT -- DEEDS	
		(L) SCHOOL DISTRICT -- MAPS	
		SCHOOL DISTRICT -- MEETINGS - ANNUAL	
		SCHOOL DISTRICT -- MEETINGS - SPECIAL	
		SCHOOL DISTRICT -- PREDECESSOR DISTRICTS	
		SCHOOL DISTRICT -- REAL PROPERTY - PURCHASE	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
SCHOOL LUNCH		SCHOOL LUNCH -- GENERAL	
		(L) SCHOOL LUNCH -- ACCOUNTING RECORDS	
		SCHOOL LUNCH -- AGREEMENT & APPLICATION FOR PARTICIPATION	
		SCHOOL LUNCH -- CLAIM SHEETS - (Make a separate folder for the claim sheets for each year, for example, SCHOOL LUNCH -- CLAIM SHEETS - 1972-73.)	
		SCHOOL LUNCH -- FOOD INVENTORY	
		(L) SCHOOL LUNCH -- MEAL TICKETS & REGISTER TAPES	
		SCHOOL LUNCH -- MENUS	
		SCHOOL LUNCH -- MILK AGREEMENT & RENEWAL APPLICATION	
	FOOD DISTRIBUTION	FOOD DISTRIBUTION -- GENERAL	
		FOOD DISTRIBUTION -- AGREEMENT FOR DIRECT DISTRIBUTION	
		FOOD DISTRIBUTION -- INVENTORY OF DONATED COMMODITIES	
		FOOD DISTRIBUTION -- REQUEST FOR ALLOCATION & DISTRIBUTION REPORT	
SCHOOLS & COLLEGES			
	LOCAL SCHOOLS*	LOCAL SCHOOLS -- CHESTNUT HILL	
		LOCAL SCHOOLS -- LINCOLN	
		LOCAL SCHOOLS -- MADISON HIGH	
		LOCAL SCHOOLS -- PARKHURST	
		LOCAL SCHOOLS -- PROSPECT JR. HIGH	

*Larger school systems often find it helpful to set up in the superintendent's or district principal's files a folder for each school by name of school. The folders are used for directives, memorandums, etc. Each paper should be cross-referenced under the subject or subjects covered.

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(SCHOOLS & COLLEGES)			
	OTHER SCHOOLS*		
		OTHER SCHOOLS -- EAST HILL CENTRAL SCHOOL	
		OTHER SCHOOLS -- LAKEWOOD SCHOOLS	
		OTHER SCHOOLS -- WOODFIELD CENTRAL SCHOOL	

*Make folders bearing school names and arrange alphabetically. Correspondence with or information about other school districts may be filed in these folders. Each paper should be cross-referenced under the subject covered.

	COLLEGES & UNIVERSITIES*		
		COLLEGES & UNIV. -- BARNARD C.	
		COLLEGES & UNIV. -- CORNELL U.	
		COLLEGES & UNIV. -- SYRACUSE U.	
		COLLEGES & UNIV. -- STATE U. OF NEW YORK	
		COLLEGES & UNIV. -- UNION U.	

*Make folders bearing college or university names and arrange alphabetically. College inquiries or reports relating to an individual pupil belong in the pupil's individual folder; information relating to college course offerings, admission requirements, etc. are usually filed in the guidance counselor's office. Other correspondence with or information from colleges may be filed in the folders provided here. Each record should be cross-referenced under the subject or subjects covered.

SUPERVISING PRINCIPAL			
		SUPV. PRIN. -- GENERAL	
		SUPV. PRIN. -- COUNTY PRINCIPALS ASSOCIATION	
		SUPV. PRIN. -- NYS COUNCIL OF SCHOOL DISTRICT ADMINISTRATORS	
		SUPV. PRIN. -- REPORTS TO BOARD OF EDUCATION	
		SUPV. PRIN. -- RESERVATIONS	
		SUPV. PRIN. -- TRAVEL EXPENSE	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
SUPERINTENDENT			
		SUPERINTENDENT -- GENERAL	
		SUPERINTENDENT -- AMERICAN ASSN. OF SCHOOL ADMINISTRATORS	
		SUPERINTENDENT -- ASSOCIATION FOR SUPERVISION & CURRICULUM DEVELOPMENT	
		SUPERINTENDENT -- NATIONAL COMMITTEE FOR SUPPORT OF THE PUBLIC SCHOOLS	
		SUPERINTENDENT -- NYS COUNCIL OF SCHOOL DISTRICT ADMINISTRATORS	
		SUPERINTENDENT -- REPORTS TO BOARD OF EDUCATION	
		SUPERINTENDENT -- RESERVATIONS	
		SUPERINTENDENT -- SPEAKING ENGAGEMENTS	
		SUPERINTENDENT -- SPEECHES	
		SUPERINTENDENT -- SPEECHES - IDEAS & QUOTATIONS	
		SUPERINTENDENT -- TRAVEL EXPENSE	
TRANSPORTATION			
		TRANSPORTATION -- GENERAL	
		TRANSPORTATION -- CONTRACTS	
		TRANSPORTATION -- REPORT OF VEHICLE AND TRAFFIC VIOLATIONS	
		TRANSPORTATION -- REQUESTS FOR TRANSPORTATION TO NONPUBLIC SCHOOLS	
		TRANSPORTATION -- SPECTATOR BUS LISTS	
	(X)	TRANSPORTATION -- STATE AID (See ADMINISTRATION; FINANCE, INCOME-STATE AID -- WORKSHEETS FOR COMPUTING STATE AID)	
		TRANSPORTATION -- TRANSPORTATION BY PUBLIC SERVICE CORPORATIONS	
		TRANSPORTATION -- TRANSPORTATION ROUTING DATA DISTRICT-OWNED BUSES	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(TRANSPORTATION)			
	BUSES		
		(X) BUSES -- BUS ACCIDENTS (See ADMINISTRATION; INSURANCE -- ACCIDENT REPORTS)	
		BUSES -- COMPLAINTS	
		BUSES -- DRIVERS - GENERAL	
		BUSES -- DRIVERS - TRAINING SCHOOL	
		BUSES -- REGISTRATION	
		BUSES -- REGULATIONS - NYS PUBLIC SERVICE COMMISSION	
		BUSES -- REPORTS - GAS CONSUMPTION	
		BUSES -- REPORTS - PERFORMANCE	
		BUSES -- REPORTS - PREVENTIVE MAINTENANCE (Make a separate folder for each bus, for example, BUSES -- REPORTS - PREVENTIVE MAINTENANCE - BUS NO. 31. File the Bus Preventive Maintenance Monthly Checksheets and the Bus Driver's Daily Reports for the particular bus in the appropriate folder.)	
		BUSES -- ROUTES	
		BUSES -- SCHEDULES	
TREASURER			
		TREASURER -- GENERAL	
		TREASURER -- REPORTS	
		TREASURER -- SURETY BOND	

END OF ADMINISTRATION

INSTRUCTION

(COLOR -- GREEN)

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
ACADEMIC RECORD			
		ACADEMIC RECORD -- GRADE SHEETS (Indicate the date of each group of grade or marking sheets used for posting to the individual permanent academic record card, for example, ACADEMIC RECORD -- GRADE SHEETS - JUNE 1972.)	
	(L)	ACADEMIC RECORD -- ACADEMIC ACHIEVEMENT RECORD CARDS	
ADULT EDUCATION			
		ADULT EDUCATION -- GENERAL	
		ADULT EDUCATION -- ATTENDANCE	
		ADULT EDUCATION -- BASIC LITERACY	
		ADULT EDUCATION -- CLASS OFFERINGS	
		ADULT EDUCATION -- REGISTRATION	
		ADULT EDUCATION -- REPORTS TO NYSED - ANNUAL	
ASSEMBLY PROGRAMS			
		ASSEMBLY PROGRAMS -- CURRENT YEAR	
		ASSEMBLY PROGRAMS -- PRIOR TO CURRENT YEAR	
ATHLETICS			
		ATHLETICS -- INTERSCHOLASTIC - GENERAL	
		ATHLETICS -- INTERSCHOLASTIC - ATHLETIC ASSOCIATION	
		ATHLETICS -- INTERSCHOLASTIC - AWARDS	
		ATHLETICS -- INTERSCHOLASTIC - NYSPHSAA	
		ATHLETICS -- INTERSCHOLASTIC - PARENTS' CONSENTS FOR PARTICIPATION	
		ATHLETICS -- INTERSCHOLASTIC - SCOREBOOKS	
		ATHLETICS -- INTERSCHOLASTIC - TEAMS & SCHEDULES	
	(X)	ATHLETICS -- INTRAMURAL (See INSTRUCTION; CURRICULUM -- PHYSICAL EDUCATION - INTRAMURAL ATHLETICS)	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
ATTENDANCE		ATTENDANCE -- GENERAL	
	(L)	ATTENDANCE -- ABSENCE EXCUSES FROM PARENTS	
	(L)	ATTENDANCE -- ATTENDANCE REGISTERS	
		ATTENDANCE -- ATTENDANCE REPORTS - CURRENT YEAR	FLASH TAB ATTENDANCE REPORTS
		ATTENDANCE -- ATTENDANCE REPORTS - (Make an individual folder for each year.)	
		ATTENDANCE -- ATTENDANCE REPORTS - SUMMER SCHOOL	
		ATTENDANCE -- ATTENDANCE SUPERVISOR	
		ATTENDANCE -- DAILY ABSENCE LIST	
		ATTENDANCE -- EMERGENCY SCHOOL CLOSINGS - ANNOUNCEMENTS	
		ATTENDANCE -- EXEMPTION CERTIFICATES	
		ATTENDANCE -- REGISTRATION	
		ATTENDANCE -- REGISTRATION OF PUPILS ATTENDING RELIGIOUS INSTRUCTION	
		ATTENDANCE -- RELEASED TIME REQUESTS TO ATTEND RELIGIOUS INSTRUCTION	
		ATTENDANCE -- REPORT OF ATTENDANCE FOR RELEASED TIME RELIGIOUS INSTRUCTION	
		ATTENDANCE -- TRANSFERS	
CLASS SCHEDULES		CLASS SCHEDULES -- GENERAL	
COMMENCEMENT		COMMENCEMENT -- GENERAL	
		COMMENCEMENT -- AWARDS	
		COMMENCEMENT -- BACCALAUREATE PROGRAMS	
		COMMENCEMENT -- PROGRAMS	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
COCURRICULAR ACTIVITIES		COCURRICULAR ACTIVITIES -- GENERAL	
		COCURRICULAR ACTIVITIES -- BAND	
		COCURRICULAR ACTIVITIES -- GLEE CLUB	
		COCURRICULAR ACTIVITIES -- ORCHESTRA	
		COCURRICULAR ACTIVITIES -- PLAYS	
		COCURRICULAR ACTIVITIES -- SCHOOL PAPER	
		COCURRICULAR ACTIVITIES -- YEARBOOK	
CURRICULUM		(Although only a single folder is indicated for each course, the high school principal, curriculum coordinator, or comparable supervisor will require several folders for each course. For example, separate folders covering course offerings, committee deliberations, curriculum development, curriculum materials from other schools, and prescribed curriculum for each area of instruction would probably be a minimum. Also, for some courses a folder should be provided for annual or special reports made to the New York State Education Department.)	
			ALPHA TAB A - G
		CURRICULUM -- AGRICULTURE	
		CURRICULUM -- ART	
		CURRICULUM -- BLACK STUDIES	
		CURRICULUM -- BUSINESS	
		CURRICULUM -- DISTRIBUTIVE	
		CURRICULUM -- DRIVER TRAINING	
		CURRICULUM -- DRUG EDUCATION	
		CURRICULUM -- ECOLOGY	
		CURRICULUM -- ENGLISH	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(CURRICULUM)			
			ALPHA TAB H - K
		CURRICULUM -- HEALTH EDUCATION	
		CURRICULUM -- HOME ECONOMICS	
		CURRICULUM -- INDUSTRIAL ARTS	
			ALPHA TAB L - Q
		CURRICULUM -- LANGUAGE ARTS	
		CURRICULUM -- LANGUAGES	
		CURRICULUM -- LIBRARY	
		CURRICULUM -- MATHEMATICS	
		CURRICULUM -- MUSIC - INSTRUMENTAL	
		CURRICULUM -- MUSIC - VOCAL	
		CURRICULUM -- PHYSICAL EDUCATION	
		CURRICULUM -- PHYSICAL EDUCATION - INTRAMURAL ATHLETICS	
	(L)	CURRICULUM -- PHYSICAL EDUCATION - PHYSICAL FITNESS TESTS	
			ALPHA TAB R - Z
		CURRICULUM -- READING	
		CURRICULUM -- SAFETY EDUCATION	
		CURRICULUM -- SCIENCE	
		CURRICULUM -- SOCIAL STUDIES	
		CURRICULUM -- SPEECH CORRECTION	
DIPLOMAS			
		DIPLOMAS -- GENERAL	
		DIPLOMAS -- EQUIVALENCY DIPLOMAS	
		DIPLOMAS -- NYS REGENTS DIPLOMAS	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
DISADVANTAGED		DISADVANTAGED -- GENERAL	
		DISADVANTAGED -- CULTURALLY	
		DISADVANTAGED -- ECONOMICALLY	
		DISADVANTAGED -- MIGRANT CHILDREN	
		DISADVANTAGED -- MODEL CITIES PROGRAM	
		DISADVANTAGED -- SPECIAL PROGRAMS	
EDUCATIONAL COMMUNICATIONS		EDUCATIONAL COMMUNICATIONS -- GENERAL	
		EDUCATIONAL COMMUNICATIONS -- AUDIOVISUAL	
		EDUCATIONAL COMMUNICATIONS -- EDUCATIONAL TELEVISION	
		EDUCATIONAL COMMUNICATIONS -- ELECTRONIC CLASSROOM	
		EDUCATIONAL COMMUNICATIONS -- NYSED CLASSROOM COMMUNICATIONS UNIT	
		EDUCATIONAL COMMUNICATIONS -- PROGRAMMED INSTRUCTION - TEACHING MACHINES	
EXAMINATIONS		EXAMINATIONS -- COLLEGE BOARD	
		EXAMINATIONS -- HIGH SCHOOL EQUIVALENCY	
		EXAMINATIONS -- NYS JUNIOR HIGH SCHOOL TESTS	
		EXAMINATIONS -- NYS MINIMUM COMPETENCE TESTS	
		EXAMINATIONS -- NYS SIXTH GRADE TESTS	
		EXAMINATIONS -- PUPIL EVALUATION PROGRAM	
		EXAMINATIONS -- REGENTS EXAMINATION & SCHOLARSHIP CENTER	
		EXAMINATIONS -- SCHEDULES	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(EXAMINATIONS)			
	LOCAL EXAMS		
		LOCAL EXAMS -- GENERAL	
		LOCAL EXAMS -- SAMPLE TESTS (These may be filed either by subject or date.)	
		LOCAL EXAMS -- TEST RESULTS	
	REGENTS EXAMS		
		REGENTS EXAMS -- GENERAL	
		REGENTS EXAMS -- ORDERS FOR EXAMINATIONS	
		REGENTS EXAMS -- PAPERS REJECTED	
		(L) REGENTS EXAMS -- PRELIMINARY CERTIFICATES - REPORTS	
		REGENTS EXAMS -- PRINCIPAL'S REPORT OF REGENTS EXAMINATIONS	
FIELD TRIPS			
		FIELD TRIPS -- GENERAL	
		FIELD TRIPS -- PARENTS' CONSENTS FOR PARTICIPATION	
		FIELD TRIPS -- POLICY	
		FIELD TRIPS -- PROPOSED	
GUIDANCE			
		GUIDANCE -- GENERAL	
		GUIDANCE -- ACTIVITIES DAY	
		GUIDANCE -- CONFERENCES - PARENTS	
		GUIDANCE -- CONFERENCES - PUPILS	
		(L) GUIDANCE -- INDIVIDUAL PUPIL CUMULATIVE RECORDS	
		GUIDANCE -- NATIONAL DEFENSE EDUCATION ACT - TITLE V	
		GUIDANCE -- PUPIL PLACEMENT	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(GUIDANCE)			
	GUIDANCE TESTS	GUIDANCE TESTS -- ACHIEVEMENT	
		GUIDANCE TESTS -- APTITUDE	
		GUIDANCE TESTS -- INTELLIGENCE	
		GUIDANCE TESTS -- STANDARDIZED	
HANDICAPPED CHILDREN			
		HANDICAPPED CHILDREN -- GENERAL	
		HANDICAPPED CHILDREN -- NYSED DIVISION FOR HANDICAPPED CHILDREN	
	EMOTIONALLY DISTURBED		
		EMOTIONALLY DISTURBED -- GENERAL	
		EMOTIONALLY DISTURBED -- SPECIAL SERVICES	
	MENTALLY HANDICAPPED		
		MENTALLY HANDICAPPED -- GENERAL	
		MENTALLY HANDICAPPED -- CENSUS REPORT	
		MENTALLY HANDICAPPED -- NYSED BUREAU FOR MENTALLY HANDICAPPED	
		MENTALLY HANDICAPPED -- REPORT OF SPECIAL CLASSES	
		MENTALLY HANDICAPPED -- SPECIAL CLASSES - EDUCABLE	
		MENTALLY HANDICAPPED -- SPECIAL CLASSES - TRAINABLE	
	PHYSICALLY HANDICAPPED		
		PHYSICALLY HANDICAPPED -- GENERAL	
		PHYSICALLY HANDICAPPED -- CENSUS REPORT	
		PHYSICALLY HANDICAPPED -- INDIVIDUAL SERVICES	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(HANDICAPPED CHILDREN)			
	(PHYSICALLY HANDICAPPED)		
		PHYSICALLY HANDICAPPED --	NYSED BUREAU FOR PHYSICALLY HANDICAPPED
		PHYSICALLY HANDICAPPED --	SPECIAL CLASSES - BLIND
		PHYSICALLY HANDICAPPED --	SPECIAL CLASSES - BRAIN INJURED
		PHYSICALLY HANDICAPPED --	SPECIAL CLASSES - CEREBRAL PALSIED
		PHYSICALLY HANDICAPPED --	SPECIAL CLASSES - DEAF
		PHYSICALLY HANDICAPPED --	SPECIAL CLASSES - HEARING HANDICAPPED
		PHYSICALLY HANDICAPPED --	SPECIAL CLASSES - PHYSICALLY LIMITED
		PHYSICALLY HANDICAPPED --	SPECIAL CLASSES - VISUALLY HANDICAPPED
		PHYSICALLY HANDICAPPED --	SUMMARY PROGRAM REPORT
HEALTH SERVICE_____			
		HEALTH SERVICE --	GENERAL
		HEALTH SERVICE --	COUNTY HEALTH AGENCY
		HEALTH SERVICE --	MENTAL HYGIENE
		HEALTH SERVICE --	NYSED BUREAU OF HEALTH SERVICE
		HEALTH SERVICE --	REPORTS
		(L) HEALTH SERVICE --	PUPIL HEALTH RECORDS
	DENTAL HYGIENE_____		
		DENTAL HYGIENE --	GENERAL
	SCHOOL NURSE_____		
		SCHOOL NURSE --	GENERAL
		SCHOOL NURSE --	REPORTS

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(HEALTH SERVICE)			
	SCHOOL PHYSICIAN		
		SCHOOL PHYSICIAN -- GENERAL	
INSTRUCTIONAL PROGRAM			
		INSTR. PROGRAM -- GENERAL	
		INSTR. PROGRAM -- CULTURAL ENRICHMENT	
		INSTR. PROGRAM -- EXPERIMENTAL PROGRAM	
		INSTR. PROGRAM -- GIFTED	
		INSTR. PROGRAM -- GROUPING	
		INSTR. PROGRAM -- PHILOSOPHY & OBJECTIVES	
		INSTR. PROGRAM -- PRE-SCHOOL PROGRAMS	
		INSTR. PROGRAM -- RELEASED TIME INSTRUCTION	
		INSTR. PROGRAM -- REPORT CARDS - ELEMENTARY	
		INSTR. PROGRAM -- REPORT CARDS - SECONDARY	
	ELEMENTARY		
		ELEMENTARY -- NYSED DIVISION ELEMENTARY EDUCATION	
		ELEMENTARY -- ELEMENTARY SCHOOL REPORT TO NYSED	
		ELEMENTARY -- KINDERGARTEN	
		ELEMENTARY -- TEAM TEACHING	
		ELEMENTARY -- UNGRADED CLASSES	
	SECONDARY		
		SECONDARY -- NYSED DIVISION SECONDARY EDUCATION	
		SECONDARY -- EARLY SECONDARY EDUCATION REPORT	
		SECONDARY -- JUNIOR HIGH SCHOOL	
		SECONDARY -- SECONDARY SCHOOL REPORT - CURRENT AND LAST FIVE YEARS	
		(L) SECONDARY -- SECONDARY SCHOOL REPORT - PRIOR TO LAST FIVE YEARS	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(INSTRUCTIONAL PROGRAM)			
	VOCATIONAL_____		
		VOCATIONAL -- GENERAL	
		VOCATIONAL -- APPRENTICE TRAINING	
		VOCATIONAL -- BOCES PROGRAM	
		VOCATIONAL -- LITERACY - EDUCATION/WELFARE	
		VOCATIONAL -- MANPOWER DEVELOPMENT & TRAINING	
INSTRUCTIONAL SUPERVISION_____			
		INSTR. SUPERVISION -- GENERAL	
		INSTR. SUPERVISION -- COORDINATORS	
		INSTR. SUPERVISION -- DEPARTMENT CHAIRMEN	
		INSTR. SUPERVISION -- POLICIES	
		INSTR. SUPERVISION -- SUPERVISORS	
LIBRARY_____			
		LIBRARY -- GENERAL	
		LIBRARY -- NYSED SCHOOL LIBRARY SERVICE	
		LIBRARY -- REPORTS	
PSYCHOLOGICAL SERVICES_____			
		PSYCHOLOGICAL SERVICES -- GENERAL	
		(L) PSYCHOLOGICAL SERVICES -- PSYCHOLOGICAL REPORTS OF PUPILS	
SCHOLARSHIPS_____			
		SCHOLARSHIPS -- GENERAL	
		SCHOLARSHIPS -- FUNDS (It may be necessary to make a separate folder for each scholarship fund, for example, SCHOLARSHIPS -- FUNDS - A.B. DOOLITTLE)	
		SCHOLARSHIPS -- NATIONAL MERIT	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(SCHOLARSHIPS)			
		SCHOLARSHIPS -- SCHOLARSHIP AID COMMITTEE	
		SCHOLARSHIPS -- STATE	
		SCHOLARSHIPS -- STATE VETERANS	
		SCHOLARSHIPS -- WESTINGHOUSE	
SOCIAL WORK SERVICES			
		SOCIAL WORK SERVICES -- GENERAL	
SUMMER SCHOOL			
	SUMMER ELEMENTARY		
		SUMMER ELEMENTARY -- GENERAL	
		SUMMER ELEMENTARY -- APPLICATION FOR APPROVAL	
		SUMMER ELEMENTARY -- ATTENDANCE	
		SUMMER ELEMENTARY -- NYSED BUREAU OF ELEMENTARY SCHOOL SUPERVISION	
		SUMMER ELEMENTARY -- REPORTS	
	SUMMER SECONDARY		
		SUMMER SECONDARY -- GENERAL	
		SUMMER SECONDARY -- APPLICATION FOR APPROVAL	
		SUMMER SECONDARY -- ATTENDANCE	
		SUMMER SECONDARY -- NYSED BUREAU OF SECONDARY SCHOOL SUPERVISION	
		SUMMER SECONDARY -- REPORTS	
TEXTBOOKS			
		TEXTBOOKS -- GENERAL	
		TEXTBOOKS -- APPLICATIONS - LOAN FOR NONPUBLIC SCHOOL USE	
		TEXTBOOKS -- INVENTORY	
		TEXTBOOKS -- SELECTION	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
TUTORING			
		TUTORING -- GENERAL	
		TUTORING -- LIST OF TUTORS AVAILABLE	

END OF INSTRUCTION

EQUIPMENT AND PLANT OPERATION AND MAINTENANCE

(COLOR -- PURPLE)

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
BUILDINGS		BUILDINGS -- GENERAL	
		BUILDINGS -- DEDICATIONS	
		BUILDINGS -- NYSED DIVISION OF EDUCATIONAL FACILITIES PLANNING	
		BUILDINGS -- SCHOOL FIRE DRILLS	
		BUILDINGS -- SCHOOL FIRE INSPECTION REPORTS	
		BUILDINGS -- SUPERINTENDENT	
		BUILDINGS -- TEMPORARY QUARTERS APPROVAL	
		(X) BUILDINGS -- USE OF BUILDINGS (See ADMINISTRATION; SCHOOL BUILDING USE)	
	BUILDING CONSTRUCTION	BLDG. CONST. -- GENERAL	
		BLDG. CONST. -- (Make an individual folder or group of folders for each building, for example, BLDG. CONST. -- ELEMENTARY - 1970)	
		(L) BLDG. CONST. -- PLANS	
		(L) BLDG. CONST. -- SPECIFICATIONS	
	BUILDING MAINTENANCE*	BLDG. MAINTENANCE -- GENERAL	
		BLDG. MAINTENANCE -- REPORTS	
		BLDG. MAINTENANCE -- REQUESTS	
		BLDG. MAINTENANCE -- SCHEDULES	
		BLDG. MAINTENANCE -- WATCHMAN'S INSPECTION CHARTS	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(BUILDINGS)			
	(BUILDING MAINTENANCE*)		

*Larger school districts may wish to group building maintenance records for each building.

BUILDING MAINTENANCE_____

FLASH TAB
BROOKVIEW

BLDG. MAINTENANCE -- BROOKVIEW - REPORTS

BLDG. MAINTENANCE -- BROOKVIEW - REQUESTS

BLDG. MAINTENANCE -- BROOKVIEW - SCHEDULES

BLDG. MAINTENANCE -- BROOKVIEW - WATCHMAN'S INSPECTION CHARTS

FLASH TAB
SENIOR HIGH

BLDG. MAINTENANCE -- SR. HIGH - REPORTS

BLDG. MAINTENANCE -- SR. HIGH - REQUESTS

BLDG. MAINTENANCE -- SR. HIGH - SCHEDULES

BLDG. MAINTENANCE -- SR. HIGH - WATCHMAN'S INSPECTION CHARTS

BUILDING REPAIRS_____

BLDG. REPAIRS -- GENERAL

BLDG. REPAIRS -- ACOUSTICAL WORK

BLDG. REPAIRS -- ELECTRIC

BLDG. REAPIRS -- FLOORS

BLDG. REPAIRS -- INSULATION

BLDG. REPAIRS -- MASONRY

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(BUILDINGS)			
	(BUILDING REPAIRS)		
		BLDG. REPAIRS -- PAINTING	
		BLDG. REPAIRS -- PLUMBING	
		BLDG. REPAIRS -- ROOFING	
CUSTODIAL			
		CUSTODIAL -- GENERAL	
		CUSTODIAL -- STAFF DUTY ASSIGNMENTS	
EQUIPMENT			
			ALPHA TAB A - H
		EQUIPMENT -- ATHLETIC	
		EQUIPMENT -- AUDIOVISUAL	
		EQUIPMENT -- AUDITORIUM	
		EQUIPMENT -- AUTOMOBILE	
		EQUIPMENT -- CAFETERIA	
		EQUIPMENT -- CLASSROOM	
		EQUIPMENT -- CLOCKS	
		EQUIPMENT -- COMMUNICATION SYSTEM	
		EQUIPMENT -- CUSTODIAL	
		EQUIPMENT -- DATA PROCESSING	
		EQUIPMENT -- GROUNDS	
		EQUIPMENT -- GYMNASIUM	
		EQUIPMENT -- HEATING	
		EQUIPMENT -- HOME ECONOMICS	
			ALPHA TAB I - Z
		EQUIPMENT -- INDUSTRIAL ARTS	
		EQUIPMENT -- LABORATORY	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
(EQUIPMENT)			
		EQUIPMENT -- LIBRARY	
		EQUIPMENT -- LIGHTING	
		EQUIPMENT -- LOCKERS	
		EQUIPMENT -- LOCKS AND KEYS	
		EQUIPMENT -- MEDICAL AND DENTAL	
		EQUIPMENT -- OFFICE	
		EQUIPMENT -- PLAYGROUND	
		EQUIPMENT -- TRAFFIC SIGNS	
EQUIPMENT INVENTORIES			
		EQUIPMENT INVENTORIES -- GENERAL	
		EQUIPMENT INVENTORIES -- AUDIOVISUAL	
		EQUIPMENT INVENTORIES -- AUTOMOTIVE	
		EQUIPMENT INVENTORIES -- BAND	
		EQUIPMENT INVENTORIES -- CAFETERIA	
		EQUIPMENT INVENTORIES -- INDUSTRIAL ARTS	
		EQUIPMENT INVENTORIES -- OFFICE	
		EQUIPMENT INVENTORIES -- PHYSICAL EDUCATION	
		EQUIPMENT INVENTORIES -- TYPEWRITER	
GROUNDS			
		GROUNDS -- ATHLETIC FIELDS	
		GROUNDS -- FENCE	
		GROUNDS -- LANDSCAPING	
		GROUNDS -- LIGHTING - OUT-OF-DOOR	
		GROUNDS -- ROADWAYS	
		GROUNDS -- SIDEWALKS	
		GROUNDS -- TENNIS COURTS	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
SERVICES			
		SERVICES -- FIRE DETECTION	
		SERVICES -- REFUSE REMOVAL	
		SERVICES -- SNOW REMOVAL	
		SERVICES -- TERMITE CONTROL	
		SERVICES -- WINDOW WASHING	

END OF EQUIPMENT AND PLANT OPERATION AND MAINTENANCE

PUPILS

(COLOR -- SALMON)

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
ACTIVITIES			ALPHA TAB A - K
		ACTIVITIES -- ALLIED YOUTH CLUB	
		ACTIVITIES -- ALUMNI ASSOCIATION	
		ACTIVITIES -- AMERICAN LEGION ORATORICAL CONTEST	
		ACTIVITIES -- CONTESTS	
		ACTIVITIES -- COUNTY FAIR	
		ACTIVITIES -- DANCING CLASS	
		ACTIVITIES -- DAR ESSAY CONTEST	
		ACTIVITIES -- EMPIRE BOYS STATE	
		ACTIVITIES -- EMPIRE GIRLS STATE	
		ACTIVITIES -- EXCHANGE STUDENT PROGRAM	
			ALPHA TAB L - Z
		ACTIVITIES -- MAGAZINE SALES CAMPAIGN	
		ACTIVITIES -- NATIONAL HONOR SOCIETY	
		ACTIVITIES -- PICNICS	
		ACTIVITIES -- RED CROSS	
		ACTIVITIES -- SOAP BOX DERBY	
AUTOMOBILES			
		AUTOMOBILES -- PUPIL USE OF	
CLASSES			
		CLASSES -- CLASS OF 1972	
		CLASSES -- CLASS OF 1973	
		CLASSES -- CLASS OF 1974	
		CLASSES -- CLASS OF 1975	

PRIMARY	SECONDARY	FOLDER CAPTION	FINDING AID
CLUBS		CLUBS -- DRAMATICS	
		CLUBS -- FUTURE FARMERS OF AMERICA	
		CLUBS -- FUTURE HOMEMAKERS OF AMERICA	
		CLUBS -- FUTURE TEACHERS OF AMERICA	
		CLUBS -- KEY	
		CLUBS -- LIBRARY	
		CLUBS -- LITERARY	
		CLUBS -- PHOTOGRAPHY	
		CLUBS -- RADIO	
		CLUBS -- SPORTS	
EXTRACLASSROOM ACTIVITY FUND		EXTRACLASSROOM ACTIVITY FUND -- GENERAL	
	(L)	EXTRACLASSROOM ACTIVITY FUND -- ACCOUNTING RECORDS	
		EXTRACLASSROOM ACTIVITY FUND -- ANNUAL FINANCIAL STATEMENT	
		EXTRACLASSROOM ACTIVITY FUND -- REPORT OF EXTRACLASSROOM ACTIVITY FUND	
		EXTRACLASSROOM ACTIVITY FUND -- RULES & REGULATIONS	
STUDENT GOVERNMENT		STUDENT GOVERNMENT -- GENERAL	

END OF PUPILS

USING THE FILING SYSTEM

The best test of the effectiveness of a filing system is the ease with which records can be filed and found. The ease of filing and finding records will naturally be conditioned by the organization of the filing system, but it will also be influenced directly by the manner in which office personnel use the filing system. For that reason the following suggestions are included to help those who use the basic filing system.

LEARNING THE FILING SYSTEM

Personnel who are to operate the basic filing system or any other filing system must familiarize themselves with the system by using it. In this case, learning by using is not a particularly difficult task. Those who installed the filing system will already have developed some familiarity with its organization. Others will acquire a comparable understanding if they will study the filing system outline and will learn the four sections of the filing system and the primary and secondary subject categories.

Those who have not previously operated a filing system based on a subject-matter classification may find using the basic filing system difficult at first for they must determine the subject classification of each record. In the beginning, they may have to ask themselves "What is this record actually about?" and "What primary or secondary subject category of the filing system covers this subject?", but the more they use the basic filing system the faster the answers to the two questions come.

Occasionally, a record will cover two or more subjects and cross-reference sheets must be placed in subject folders other than the one where the record is filed (see page 24).

PREPARING RECORDS FOR FILING

Preparing a record for filing involves determining its subject and selecting the appropriate location for it in the files. In the majority of cases the record will be covered by one of the specific folder captions. If it cannot logically be filed in any of the specific folders, file the record in the appropriate general folder. A real effort should be made, however, to fit each record into one of the specific folders, for dumping records thoughtlessly into general folders when specific folders are available for them will later complicate the finding of the records. Keep in mind the following basic filing techniques in preparing records for filing:

1. Avoid using paper clips or pins to fasten records together or to fasten records to folders. Use staples for this purpose. Always staple a reply to an inquiry.

2. Paste small clippings to sheets of plain paper of sufficient size to avoid losing or crushing the clippings in folders.

3. Trim and mend records, if necessary, before placing them in the folders.

4. Arrange records in chronological order in folders with the most recent records at the front.

FILING RECORDS

Since the successful operation of a filing system depends to a large extent upon the skill with which records are filed, follow these filing techniques:

1. Organize the filing so that it can be done regularly. Time can often be saved by coding a group of records at one time before filing them. Coding involves merely noting on a record the section and folder caption under which it is to be filed. Typed copies of the filing system outline, prepared after the installation has been completed and made available to office personnel for reference purposes, can save time in coding records.

2. Type name of section upon the appropriate colored label, paste to a card and place in the label holder of the filing drawer or drawers containing that section. The colored label will aid in quickly locating a desired section.

3. Use the color of the label and the first word of the folder caption as a guide in filing the folders. The label color shows the section in which the folder will be filed while the initial word of the folder caption, corresponding to a primary or secondary subject guide card, indicates the location of the folder within each section. General folders are filed directly behind the guide cards. Specific subject folders are filed alphabetically behind the general folders.

4. Leave about one-fifth of each filing drawer free for expansion. Working with overcrowded files is difficult.

5. Grasp a folder firmly in the middle when removing it or returning it to the filing drawer. Do not handle it by the tab.

6. Avoid crushing items in the bottom of the filing drawer, or misplacing records between folders.

7. Utilize devices that will save time and labor. A small shelf that hooks onto a filing drawer handle and holds records while they are being filed may be used to advantage.

8. Insert "Out Cards" to show the temporary location of records that have been removed from their folders or of folders that have been removed from the files. Such a card, indicating who has the record or folder and the date of its removal, is inserted where the record or folder belongs. It is removed when the record or folder is returned to the files. An "Out Card" can be prepared by writing the above information on a heavy piece of paper or cardboard that projects above the folder edge, or specially designed "Out Cards" can be purchased.

9. Insert a Locator Card (see page 23) in the files when records are filed or stored at another location.

EXPANDING THE FILES

A filing system is not static; it must be expanded when warranted by the addition of new guide cards and folders. In preparing new folders, keep in mind the following points:

1. Make a second folder when one contains more than fifty pieces of paper. Differentiate between the folders by indicating on the folder labels the inclusive dates of the records within the folders (see page 19).

2. Make a specific subject folder when a general folder contains five or ten papers on the same subject, being careful that the caption on the new folder indicates accurately the contents of the specific folder.

THE DISPOSITION OF VALUELESS RECORDS

A systematic program for the transfer or retirement of inactive records and the disposition of valueless records must be a part of every school filing system if that filing system is to operate effectively.

Instructions for setting up the transfer or retirement files are given on page 26.

Most valueless records of a school district can be destroyed legally only with the consent of the Commissioner of Education, acting pursuant to Section 65-b of the Public Officers Law and Part 185, Title 8, of the Official Compilation of Codes, Rules and Regulations of the State of New York.

A list of permanent and disposable school records, called a Records Retention and Disposition Schedule, is issued periodically to aid school districts in disposing of valueless records. The Schedule indicates to school officials the minimum legal retention periods of records that are disposable. Complete instructions for its use are included in the Schedule.

Request for the Commissioner's consent to the disposition of records described in a Schedule must be submitted on the appropriate Public Officer's Certification. The applying records custodian certifies that the school board has passed a resolution adopting use of the Schedule in disposing of records that do not have sufficient administrative, fiscal, or legal value to warrant retention beyond the prescribed period. Consent of the Commissioner, when granted, remains in effect until the Commissioner or school board rescinds use of the Schedule or a superseding one is adopted by the board.

Parts of the Title sheet and introduction to the listing of records of a Records Retention and Disposition Schedule are shown at the top of page 76, followed by the major parts of a Public Officer's Certification.

RECORDS RETENTION AND DISPOSITION SCHEDULE NO. 1-S-1

for use by

(This number varies with date of issue)

SCHOOL DISTRICTS

RECORDS RETENTION AND DISPOSITION SCHEDULE NO. 1-S-1

The following legal minimum retention periods have been established pursuant to the provisions of section 65-b of the Public Officers Law. Consent of the Commissioner of Education will be granted to the disposition of records that have been retained the indicated length of time when the preceding instructions have been complied with.

ITEM NUMBER	DESCRIPTION OF RECORD	DISPOSABLE AFTER HAVING BEEN RETAINED:
	Records listed here.	

PUBLIC OFFICER'S CERTIFICATION
FOR USING
RECORDS RETENTION AND DISPOSITION SCHEDULE NO. 1-S-1

School District Legal Designation _____ County _____

Pursuant to the provisions of section 65-b of the Public Officers Law,

I CERTIFY that:

(a) only those records will be disposed of as described in Records Retention and Disposition Schedule No. 1-S-1 that are in my jurisdiction and do not have sufficient administrative, fiscal or legal value to warrant continued retention when they have been held the minimum prescribed periods of time; and

(b) the governing body of the public corporation of which I am an officer has authorized by official resolution the disposition of records by adopting Records Retention and Disposition Schedule No. 1-S-1 containing minimum retention periods, by action of the governing body

on _____.
(date)

TYPE or PRINT
Applicant's Name and Address

Name _____ _____
Signature

Address _____ _____
Title

_____ _____
ZIP Code Date

COMMISSIONER'S ACKNOWLEDGMENT AND CONSENT

I acknowledge that a signed copy of the above certification has been filed in my office on _____. Pursuant to the provisions of section 65-b of the
(date)
Public Officers Law, consent is granted to the disposition of records that have been retained the minimum length of time by your office as described in Records Retention and Disposition Schedule No. 1-S-1.

Consent Number _____
Commissioner of Education

_____

BLANK FORMS STORAGE

The active files are not the place for the storage of blank forms. Blank forms should be filed or stored so that they are easily identified and readily available.

The arrangement of blank forms storage shown below is patterned after the basic filing system. In setting up the blank forms drawer, use the same materials and follow the same instructions for their preparation as given for the installation of the filing system.

The example given below is merely suggestive of a few forms that might be included in a blank forms storage drawer.

Primary subject guide cards	Secondary subject guide cards	Individual folders

ADMINISTRATION

(COLOR -- BLUE)

BUDGET

BUDGET -- BUDGET REQUEST FORMS

EMPLOYMENT CERTIFICATES

EMPLOYMENT CERTIFICATES -- (by type of form)

FINANCE

FINANCE -- PURCHASE ORDERS

FINANCE -- PURCHASE REQUISITIONS

FINANCE -- RECEIPT FORMS

FINANCE -- VOUCHER FORMS

INSURANCE

INSURANCE -- ACCIDENT REPORT FORMS

INSURANCE -- CLAIMS FORMS

INSURANCE -- WORKMEN'S COMPENSATION

PAYROLL

PAYROLL -- EMPLOYEES WITHHOLDING EXEMPTION CERTIFICATES

PAYROLL -- SALARY CHANGE NOTICES

PAYROLL -- SAVINGS BOND APPLICATIONS

Primary subject guide cards	Secondary subject guide cards	Individual folders
PERSONNEL		PERSONNEL -- HEALTH INSURANCE FORMS
		PERSONNEL -- LIFE INSURANCE FORMS
	NON-PROFESSIONAL	NON-PROFESSIONAL -- APPLICATION FORMS
		NON-PROFESSIONAL -- CIVIL SERVICE FORMS
		NON-PROFESSIONAL -- OATH OR STATEMENT FORMS
		NON-PROFESSIONAL -- RETIREMENT FORMS
	PROFESSIONAL	PROFESSIONAL -- APPLICATION FORMS
		PROFESSIONAL -- OATH OR STATEMENT FORMS
		PROFESSIONAL -- RETIREMENT FORMS
SCHOOL BUILDING USE		SCHOOL BLDG. USE -- REQUEST FORMS
TRANSPORTATION		
	BUSES	BUSES -- REPORTS - GAS CONSUMPTION
		BUSES -- REPORTS - PERFORMANCE
		BUSES -- REPORTS - PREVENTIVE MAINTENANCE

INSTRUCTION

(COLOR -- GREEN)

ACADEMIC RECORD		ACADEMIC RECORD -- GRADE SHEETS
		ACADEMIC RECORD -- ACADEMIC RECORD CARDS
ADULT EDUCATION		ADULT EDUCATION -- REGISTRATION FORMS
ATTENDANCE		ATTENDANCE -- REGISTRATION FORMS
		ATTENDANCE -- REPORT OF ATTENDANCE FOR RELEASED TIME